

A Financial Feasibility Analysis of
Public and Private Campground Develop.
in the Greater Yellowstone/Grand Teton
Area. M.S., Water Resources, Dec. 1978
Jacquelin P. Buchanan

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The study examines public agency campground policy and analyzes the financial feasibility of public and private campgrounds in the Greater Yellowstone/Grand Teton area. Breakeven fee schedules are developed to determine the financial feasibility of public and private campgrounds in the area, stressing the importance of the cost of land on the feasibility issue.

FINAL REPORT

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Campground Alternatives in the Grand Teton/Yellowstone

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A FINANCIAL FEASIBILITY ANALYSIS OF PUBLIC AND PRIVATE
CAMPGROUND DEVELOPMENT IN THE GREATER
YELLOWSTONE/GRAND TETON AREA

by

Jacquelin P. Buchanan

A Thesis

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CHAPTER I

INTRODUCTION

The Greater Yellowstone/Grand Teton (GY/GT) area, made up of two national parks, seven national forests, and adjacent state and private land, is one of the nation's most popular scenic and recreational attractions. In 1976, more than two and a half million people visited Yellowstone National Park, and 3,856,836 people traveled through Grand Teton National Park.¹ While most of the visitors to the area explore both national parks, a large number of visitors also make use of the seven adjacent national forests. In fact, it is nearly impossible for visitors coming from outside of the region to reach the national parks without at least driving through one of the national forests. On the other hand, the national forests can hardly be considered transition zones into the parks. Managed for multiple use, which includes recreation, they are in themselves great attractions for the outdoor enthusiast.

Since the millions of visits to the area are heavily concentrated in the summer months, the present transportation system is hard-pressed to handle the enormous seasonal volume of slow moving, frequently stopping traffic and serious transportation problems to, from, and within the region result.

¹Yellowstone and Grand Teton National Parks Total Visits by Month for the Years 1957 through 1977, August, 1977. (Mimeographed.)

In 1974, in an effort to meet the needs of both visitors and local residents of the area, a regional transportation study was authorized by the Secretary of the Interior. A study team composed of individuals from the Forest Service, Park Service, state and local agencies, and contracted specialists was formed to formulate and evaluate alternative transportation systems for the region.²

Statement of Problem

An important issue that surfaced in the course of the Greater Yellowstone Cooperative Regional Transportation Study was one regarding overnight accommodations in the area. The enormous size and many visitor attractions of the region often make it necessary for visitors to spend at least one, and often several nights in hotels, motels, or campgrounds in the area. In the course of the transportation study, both federal and local officials indicated that there were occasions during the peak seasons of 1975 and 1976 when all known overnight facilities in the area were filled by early afternoon. This situation left camping visitors who arrived late without reservations only two alternatives: to travel some 80 to 100 miles from the parks to find overnight facilities, or to simply pull off in some area not designated for camping.

The alternative of driving additional long distances causes not only inconvenience and disappointment for campers, but also possible traffic hazards and danger from campers driving much farther than they

²National Park Service Denver Service Center and U.S. Forest Service Regions 1, 2 and 4, "Greater Yellowstone Cooperative Regional Transportation Study, Regional Assessment," 1977.

If, on the other hand, the management objective is to provide an adequate number of overnight accommodations within the GY/GT area, several alternatives exist. Additional motels, hotels, concession lodges, dude ranches, and public and private campgrounds might all help to alleviate the accommodations problem. Since it is likely that the visitors who came to the GY/GT area intending to camp actually do prefer camping to unexpected stays in motels or hotels, this study will focus on the provision of campground accommodations.

The master plans for Grand Teton and Yellowstone National Parks have stated that overnight accommodations within the park boundaries will be held at 1972 levels.⁴ The Resources Planning Act of 1974 requires that Forest Service funding and development emphasize a proportionally higher percentage of dispersed recreation than in the past. The act further outlines a Forest Service policy of encouraging the private sector to meet most of the needs for additional developed site facilities.⁵ If, however, the camping public prefers Park Service or Forest Service type campgrounds (i.e., stream or lake oriented with relatively few campsites per acre) to more intensively developed private campgrounds, then the agencies might have to reevaluate their policies of encouraging campground development on adjacent private lands.

⁴U.S. Department of the Interior, National Park Service, Yellowstone Master Plan, p. 29; and Final Environmental Statement, Master Plan, Grand Teton National Park, 1975, p. 26.

⁵U.S. Department of Agriculture, Forest Service, RPA, A Recommended Renewable Resource Program, as Required by the Forest and Rangeland Renewable Resources Planning Act of 1974, p. 625.

had planned. The second alternative, pulling off into an undesignated area to camp, causes environmental problems as well as enforcement problems for private landowners and land managing agencies in the area. It has long been recognized that given a choice, most campers prefer a site near a stream or lake.³ The group of campers who choose to find an undesignated site to "get by" for the night, then, can cause significant water pollution problems and serious damage to riparian vegetation, as well as litter problems and crop damage. Further, state, federal, and local agencies responsible for law enforcement in the area do not have the time or personnel available to eliminate indiscriminate camping. Simply stated, then, the problem was that there appeared to be occasions when there were more camping visitors staying in the GY/GT area than there were overnight facilities to accommodate them.

There are a number of solutions to the problem of too few camp-sites in the GY/GT area. If the management objective is to control indiscriminate camping, then more emphasis could be placed on enforcement by the land management agencies in the area. Better information dissemination regarding crowded facilities could be another solution, and an advanced registration system for campers would perhaps also help balance the number of campers in the area with the number of available camping units.

³Malcolm I. Bevins, Tommy L. Brown, Gerald L. Cole, Kenneth J. Hock and Wilbur F. LaPage, Analysis of the Campground Market in the Northwest. Report II. Privately Owned Areas (Vermont Agricultural Experiment Station Bulletin 679, May 1974), p. 5.

If there is an apparent need for additional camping units in the GY/GT area, as indicated by the indiscriminate camping mentioned before, the management concern becomes one of identifying the reasons why the private sector has not provided the needed additional campground facilities. It is possible that the lack of private sector action has been due to an absence of financial incentive to develop expanded facilities or new campgrounds. Because the campground business is directly affected by uncontrollable factors such as weather and a short tourist season, it is possible that private campground owners cannot reasonably recover the investments required for development and operation of new or expanded campgrounds. New development may also be affected by labor supplies, high interest rates, the short camping season, and the capriciousness of recreation tastes. If this is the case, the Forest Service and Park Service may find it necessary to subsidize the private sector in some way.

Description of the Area and Existing Camping Facilities

The Greater Yellowstone/Grand Teton area is defined in this study as including Grand Teton and Yellowstone National Parks; Shoshone, Bridger, Teton, Targhee, Beaverhead, Gallatin and Custer National Forests; and state, locally and privately owned land within and adjacent to the parks and forests (Appendix A).

There are approximately 240 campgrounds in the area, with more than 10,889 individual camping units.⁶ The number of campsites managed by the public agencies in the area exceeds the number managed by the private sector by 1,241 camping units (Tables I and II).⁷

Definition of Terms

For the purpose of this study, the term "campground" refers to any developed overnight camping area accessible to vehicular traffic. Although the term "campground" in this study describes a wide variety of development levels, it does not include wilderness or backcountry camping areas, nor does it include group or organization camps.

The terms "public" campground and "private" campground are used frequently in this study. "Public" campground refers to any developed campground operated by a public agency (i.e., Forest Service or Park Service campgrounds). "Private" campground always refers to a campground owned and operated by private individuals or corporations. All of the privately owned and operated campgrounds encountered in the course of this study were open to the general public.

⁶Wheelers Recreation Vehicle Resort and Campground Guide, 1977 North American Edition (Park Ridge, Illinois: Print Media Services Ltd., 1977) and Woodall's Campground Directory, Western 6th Edition (New York: Grosset and Dunlap, 1977).

⁷Lists of private campgrounds were compiled from 1977 campground directories. Since there is a time lag between the opening of a new campground and its listing in the directories, it is possible that a few new campgrounds were overlooked. Inquiries were made throughout the area, however, and no new campgrounds were reported.

TABLE I

NUMBER OF PUBLIC CAMPGROUNDS AND CAMP UNITS
IN THE GY/GT AREA BY MANAGING AGENCY^a

Agency	Number of Campgrounds	Number of Camp Units
National Park Service:		
Teton and John D. Rockefeller, Jr. National Memorial Parkway	6	975
Yellowstone	12	2,250
U.S. Forest Service:		
Beaverhead	8	73
Bridger/Teton	35	523
Custer	15	276
Gallatin	31	508
Shoshone	28	789
Targhee	34	539
Wyoming Recreation Commission	1	100
Idaho Department of Parks and Recreation	1	32
TOTAL PUBLIC CAMPGROUNDS AND UNITS	169	6,065

^aThe number of campgrounds and camp units were reported by the agencies in response to a questionnaire soliciting that information (Appendix B).

TABLE II
NUMBER OF PRIVATE CAMPGROUNDS AND CAMP UNITS
BY STATE AND NEAREST TOWN

State	Town	Campgrounds	Units
Montana	Big Sky	3	305
	Cooke City	0	0
	Gardiner	4	351
	Livingston	7	357
	West Yellowstone	14	860
	TOTAL	31	1,873
Idaho	Mack's Inn/Island Park	6	314
	TOTAL	6	314
Wyoming	Cody	13	930
	Dubois	6	246
	Jackson	11	836
	Moran Junction ^a	5	625
	TOTAL	32	2,637
THREE-STATE TOTAL		69	4,824

^aIncluded in the Moran Junction tabulation are three campgrounds that are on Park Service managed land: Flagg Ranch and Huckleberry Hot Springs in the John D. Rockefeller, Jr. National Memorial Parkway, and Colter Bay Trailer Village in Grand Teton National Park.

Literature Review

Two broad categories of camping market research were reviewed in the course of this study. The first and most extensive category is that pertaining to the demand side of the camping market. This literature was reviewed only for general background purposes, and had no direct application to the study objectives or results.⁸ The second research category pertains to the supply side of the camping market, and the studies included in this category were of particular importance to the study effort. Much of the literature pertaining to the supply side of the camping market is cited in another fairly comprehensive bibliography.⁹

Horvath classified the relationship between the private and public sectors, regarding provision of recreation opportunities, as a silent competition. Further, he delineated the role of the private sector in providing recreation opportunities as one that:

...should relieve the pressure from the areas administered by the public agencies, which up to now have carried, and are still carrying, most of the burden.¹⁰

⁸W. F. LaPage and A. C. Haaland, Annotated Bibliography of Camping Market Surveys (USDA Forest Service General Technical Report NE-11, 1974), pp. 1-37.

⁹U.S. Department of the Interior, National Park Service, Campgrounds, Reference Material and Sources of Information Pertaining to Planning, Development, and Operation of Private Campgrounds. pp. 1-44.

¹⁰J. C. Horvath, "The Role of the Private Sector in Providing Recreational Opportunities," in B. L. Driver, ed., Elements of Outdoor Recreation Planning (Ann Arbor: The University of Michigan Press, 1970), p. 168.

There were a number of studies that were used extensively to develop a comprehensive list of cost items required for financial analysis of private campgrounds.¹¹ These same studies were also valuable for verifying cost figures acquired from private campground owners, and for providing a basis for developing cost figures when none were available from primary sources.

Of the studies cited, Sherling and McCoy's Alabama study provided the most exhaustive description of private campground facilities and their costs. Greuter compared investments and returns by size of campground, and delineated components of cash expenses and returns.

Many other feasibility and market structure studies were reviewed in the course of this study, and are cited in the bibliography. Cooper's analysis was especially useful in analyzing the fees charged by campground operators, especially when it was supported by the analysis presented by Bevins. In combination, these two studies

¹¹J. Grueter, The Private Camping-Oriented Outdoor Recreation Industry in Southern Maine...A Business Analysis (University of Maine at Orono: College of Life Sciences and Agriculture Experiment Station, Circular 198, 1972); A. B. Sherling and E. W. McCoy, Costs and Returns of Overnight Campgrounds in Alabama (Auburn University: Agricultural Experiment Station, Circular 198, 1972); James F. Conners and James C. Whittaker, Maine's Sebago-Long Lakes Campgrounds, A Market Structure Analysis (University of Maine at Orono: Life Sciences and Agriculture Experiment Station, Bulletin 698, 1972); M. I. Bevins et al., Analysis of the Campground Market in the Northeast, Report II - Privately Owned Areas (University of Vermont, Agricultural Experiment Station, Bulletin 679, 1974); Eugene Dice and Darson Wang, A Study of Expenditures and Management (Michigan State University, Cooperative Extension Service, Bulletin E-756, 1973); Robert L. Wilder, Campground Development Guide (Oregon State University, Extension Service, Special Report 370).

provided much of the format for the feasibility analysis that was conducted for this study.¹²

It was the nature of this study that most of the information that had direct application to the information and discussion came not in the form of literature, but rather in the form of both published and unpublished government documents. Since a part of this study is devoted to an analysis of those documents, they were not included in the literature review. All of the documents, as well as additional studies reviewed, are cited in the bibliography.

¹²Rollin Cooper, "Setting Realistic Campground Rates," WACO Workshops for Campground Operators (University of Wisconsin, Extension Service, 1977); and Malcolm I. Bevins, "Campground Pricing for 1974" (Eastern Camping Conference, Springfield College, 1974).

CHAPTER II

OBJECTIVES

The main objective of this study was to identify possible reasons why the private campground development presumed by the Forest Service and Park Service in their recreation development policies for the GY/GT area has not taken place. The study was designed to determine if private campground development in the area is financially feasible, and to further examine the feasibility of alternative types of campground development and operation.

The following three objectives were synthesized to satisfy the main objective.

1. To define and document past and current policies of public agencies that have or are likely to have camping facilities in the GY/GT area, especially regarding encouragement given by the agencies to private sector development and operation of campgrounds.

2. To collect information from the public agencies in the area (Forest Service, Park Service, Wyoming Recreation Commission, Idaho Department of Parks and Recreation, and Montana Department of Fish and Game) on the costs of developing, maintaining, and operating public campgrounds, and to develop feasibility schedules for public campgrounds in the GY/GT area.

3. To collect data from a representative number of private campground operators in the GY/GT area to be used in developing cost

estimates, required use levels, fee schedules and other financial and descriptive data pertinent to the construction of feasibility schedules for private campgrounds in the GY/GT area, and to support this data with information obtained from a detailed literature review of existing campground studies.

Procedures

Objective 1

Appropriate officials in the public agencies operating campgrounds in the GY/GT area were surveyed in an effort to determine a clear statement of the various agencies' policies regarding both private and public campground development.

The survey instrument (Appendix B) was designed in collaboration with Drs. B. L. Driver (Rocky Mountain Forest and Range Experiment Station) and Perry Brown (Colorado State University). Respondents were asked to identify past and current problems experienced by their agencies in the GY/GT area, as well as to indicate past and current agency policies and practices regarding campground development. The officials were also asked to document, if possible, their agencies' past and current campground policies.

Since the officials surveyed are responsible for formulating or implementing their agencies' campground policies, the questionnaire also included a number of opinion and perception questions. Respondents were asked to identify (1) campground policies they would like to have established in the area, (2) policies they felt would be established in the area, and (3) any problems their agencies might

have in implementing the policies they identified in (1) and (2). The officials were also asked to indicate what they felt would be the trend in total campground accommodation needs in the area, and to indicate, if possible, their agencies' current estimate of campground accommodation needs.

Since the questionnaire was designed to elicit both objective and subjective information, each was accompanied by a detailed cover letter (Appendix B) assuring confidentiality and encouraging frank and open answers. The respondents were further urged not to feel limited by the questions asked, but to include any information they felt would be useful to the study effort.

In June, 1977, questionnaires were sent to the seven Forest Supervisors in the study area; the Regional Foresters of Forest Service Regions 1, 2 and 4; the Superintendents of Yellowstone and Grand Teton National Parks; the Regional Director of the National Park Service; and the administrative heads of the appropriate state recreation agencies in Wyoming, Montana and Idaho.

In addition to questionnaire responses, relevant available past and current agency policy documents were carefully examined to aid in the development of clear and accurate policy statements.

Objective 2

The cost data required to complete this task was collected from the various agencies through direct and telephone contact with appropriate agency officials. Campground development costs were obtained from the NPS Service Center Estimating Station, the Recreation and

Lands Division of Forest Service Region 2, recreation specialists with Bridger/Teton and Medicine Bow National Forests, and the Wyoming Recreation Commission.

Maintenance and operation costs were obtained from Forest Service Recreation Information Management (RIM) handbooks, RIM Facility-Condition reports and individual national park maintenance personnel.

Since the various agencies have widely diverse methods of estimating and accounting for costs, the data collected were converted into per-unit costs of construction, maintenance and operation for each agency. This procedure made the costs of the various agencies comparable to each other, as well as to those costs encountered by private sector campground operators.

The cost data collected from the public agencies was used to compute development, maintenance and operation cost schedules for campgrounds of comparable development levels and density levels to those generally provided by public agencies. These cost schedules, including an allowance for the cost of land, if it was not included in data obtained from the agencies, were used to determine the per-unit cost of providing public campgrounds and the effect of different capacity use rates on unit costs.

Objective 3

Cost information comparable to that obtained from the public agencies was collected from private campground operators in the GY/GT area. In addition to cost data, private campground operators provided extensive descriptive information about their campgrounds and identified

specific problems they had encountered regarding the operation of their campgrounds.

A review of existing campground studies, as described in the previous chapter, was used to identify a comprehensive list of cost items encountered by private campground operators. This list was the basis for the development of a tentative private campground operator interview instrument. The first part of the instrument was designed to collect detailed descriptive information about private campgrounds in the GY/GT area. The second section was designed to solicit the campground operators' perception about the camping market and any business problems they had experienced or observed. The third section was designed to collect detailed construction, maintenance and operation costs for private campgrounds.

Current campground directories were used to compile a list of private campgrounds in the GY/GT area.¹ Seven campground operators were contacted for the purpose of pre-testing the interview instrument. Nine campgrounds were chosen for the actual survey on the basis of size, location and management structure. The operators of the nine sample campgrounds were sent brief letters explaining the purpose of the study, and requesting the operators' cooperation in the study effort (Appendix C).

In July of 1977, the seven pre-test campground operators were interviewed for the purpose of testing the interview instrument. These interviews led to minor revisions in the cost sections of the

¹Op. cit., Wheeler and Woodalls.

instrument. The descriptive and perception sections of the instrument remained substantially the same (Appendix D).

The nine sample campground operators were contacted during the second two weeks of July, 1977. Each interview was prefaced by a detailed explanation of the study objectives. During the descriptive and subjective portions of the interview, care was taken to avoid suggesting possible problems or leading the person being interviewed to structured conclusions. The interviews lasted from 25 minutes to an hour.

The descriptive information collected from the private operators was used to construct a profile of an average private campground in the GY/GT area. The cost information gathered was treated in much the same manner as was that collected from the public agencies. Per-unit costs of construction, operation and maintenance were developed for the average private campground in the GY/GT area. Because few of the campground operators contacted were original owners, and because most of the campgrounds had not been built within the past few years, many secondary sources were used to help develop and support the construction cost data collected from the private operators. Private campground feasibility schedules were constructed for different levels of density and for various occupancy rates.

The information collected and developed in objectives 1, 2 and 3 was synthesized to identify those conditions under which the private sector might be expected to develop and operate campgrounds in the GY/GT area.

CHAPTER III

PUBLIC AGENCY POLICIES, PRACTICES AND PROBLEMS

Campground facilities in the GY/GT area are provided by federal agencies and state agencies, as well as by private campground operators. Tables I and II illustrate the fact that the government agencies in the GY/GT area operated more campgrounds with more camping units than did the private sector. It is evident that the campground policies of the government agencies in the area have important and direct effects on the private sector regarding new campground development. For example, if the Park Service constructed several very large new campgrounds within Yellowstone Park, the action could be expected to have an immediate effect on the business of private campground operators in Gardner, West Yellowstone and Cody.

The entire campground market in the GY/GT area, then, operates within or in response to the policy framework provided by the various government agencies. Park Service and Forest Service policies, of course, have the most important effects on the market, since those agencies provide the largest share of campgrounds in the area, and since they manage the important visitor attractions in the area. State agencies affect the market to a lesser extent. In order to examine the financial feasibility of public and private campgrounds in the GY/GT area, it was felt necessary to first review the various agency policy background with respect to campground development.

Further, it was considered beneficial to identify all inter- or intra-agency problems that might have existed in the past or at the time of the study that could affect the camping market in the area.

These general objectives provided the rationale for the agency questionnaire (Appendix B) that was mailed to fifteen officials in June, 1977. This chapter will first, examine the rationale for the questions included on that instrument; second, summarize the responses to the questionnaire; and third, summarize and document agency campground policy for the Park Service, Forest Service and state agencies in the GY/GT area.

Rationale for Questionnaire

There were four sets of related questions included in the public agency questionnaire. The first set of questions (questions 1 and 2, Appendix B) was included to provide an historical perspective of campground development in the GY/GT area, and to document the reasons why the agencies developed the number of campgrounds they did over the past twenty years.

The information requested in the first question set was included also to provide a background for the second set of questions (question 3), which dealt with past and current agency problems regarding campground development. The officials were presented with a list of possible past and current problems, and were asked to identify and explain those which applied to their agencies. It was felt that the reasons for the problems identified in Chapter I (indiscriminate camping and environmental damage caused by an apparent lack of needed

camping space) might be identified through the type of self-analysis afforded by this question set. Officials were asked to consider past and current problems with adequacy of agency policy, with campground budgeting, with other agencies in the area, with public or private rules or regulations, and with development of campgrounds by the private sector.

The third question set (questions 4, 6 and 7) related to agency policy. First officials were asked to identify their agencies' practices regarding a number of campground development policies. The next policy question asked for identification and explanation of significant changes in the agencies' policies over the past twenty years. The last part of this question set requested documentation of past and current agency campground policies. The information collected with this set of questions was useful not only for identification of agency campground policies, but also for identifying areas of disagreement regarding perception of those policies.

The fourth set of questions (questions 5, 8, 9, 10, 11 and 12) requested that the officials identify both preferred and expected public and private campground policies for the GY/GT area. Officials were asked to identify (1) campground policies they felt were feasible in the GY/GT area, (2) campground policies they would like to have established in the GY/GT area, (3) campground policies they felt would be established, and (4) problems their agencies might have in implementing (2) and (3). Officials were also asked to assess future campground accommodation needs, and to identify their agencies'

estimates for those needs. This set of questions was included because to various extents, the officials surveyed were responsible for formulating or at least implementing their agencies' campground policies. Their perceptions of the policies in the area regarding campground development, then, were felt to be nearly as important as the policies themselves.

Agency Response

Of the fifteen questionnaires mailed, twelve completed questionnaires were returned: 8 from the Forest Service, 2 from the Park Service and 2 from state agencies.

In response to the first question set pertaining to the past development of campgrounds in the GY/GT area, the Forest Service respondents indicated that there had been a slow increase in the number of campgrounds and camping units over the past twenty years. An exception occurred between 1960 and 1965, when many small sites were eliminated or consolidated.

When respondents were asked to indicate the reasons why their agency developed the number of campgrounds and sites it did during the past 20 years, the most often mentioned reasons by Forest Service respondents included funding availability, demand projections and perceived needs based on use. Two Forest Service respondents indicated that funding for campground development was available in the late 1950's and early 1960's. It is noteworthy that none of the respondents listed specific Forest Service policy as a reason for development.

Park Service response to the first question set indicated that in one park there had been an overall increase in campground facilities over the past 20 years, and in the other park there had been a decrease. Unlike the Forest Service response, the agency rationale for Park Service campground development was very policy oriented: Regarding reasons why the agency developed the numbers of campgrounds and units it did over the past 20 years, both respondents indicated that in the 1950's and 1960's there was an agency policy encouraging expansion of overnight facilities. A change occurred in the 1970's, however, and both respondents indicated that additional overnight facilities development was not expected. The respondents cited Mission 66 documents, park management objectives, and the two park master plans in documenting past and current policies.

Both of the state agency respondents indicated that their campgrounds had been built primarily to serve state park visitors, but one acknowledged that more national park visitors were accommodated than were state park visitors. Neither state respondent cited specific policy guidelines as a rationale for campground development.

The second question set pertaining to past and current problems with campground development yielded a wide variety of response. Forest Service response to the question concerning past and current problems with public and private campgrounds in the GY/GT area indicated that past budgeting for campgrounds had been a problem for all seven of the forests. More specifically, four respondents indicated that there had been less than sufficient funds for maintenance. Other past budgeting problems mentioned were lack of funding

for needed campground updating, inconsistent funding, total lack of funding for new construction, and funding difficulty in programming for steady growth. Five respondents indicated that budgeting for maintenance was a current problem, although one cited a vast improvement in budgeting for campgrounds as a result of the Resources Planning Act of 1974.

Two respondents indicated that there had been a problem with the adequacy of past agency policy regarding campgrounds, as there had been no definite policy that considered the relationship between private and agency campgrounds. Two respondents indicated that the draft Central Rocky Mountain Area (CRMA) Planning Guide would correct problems resulting from the inadequacy of past agency policy.

While two respondents cited past conflicts between the Forest Service and other agencies regarding campground development as a problem, both indicated that this problem is currently being corrected. One respondent credited the draft CRMA Planning Guide with resolution of these conflicts. One respondent indicated that the Park Service policy of not providing additional capacity within the parks has shifted the impact onto adjacent national forest sites.

Regarding public or private rules and administrative regulations concerning campgrounds, two respondents mentioned a past and current problem caused by low fees charged for public campsites and relatively high fees charged by the private sector. One of these respondents indicated that the availability of some free public campgrounds is regarded by the private sector as unfair competition.

Five Forest Service respondents cited a problem with past and current development of campgrounds by the private sector. Two respondents indicated that private development has been inadequate. One elaborated that this lack of development makes it necessary for destination travelers to the area to seek space in public sites--mostly on national forest lands. One respondent indicated again that the availability of free public campsites, both in the past and present, is regarded by the private sector as unfair competition. One respondent indicated that private campground development is not taking place fast enough, and another said that there is a problem with sub-standard facilities in general with private campgrounds.

Four respondents indicated that there were additional past and current problems regarding public and private campgrounds in their areas. The first indicated a problem with administrator's varied backgrounds, personal biases and differing interests. Another mentioned that past policy and construction standards often did not recognize trailer camping and, as a result, that many units need to be updated. A third respondent specified a past and current problem with wear and tear on campgrounds heavily used as overnight stops by visitors to Yellowstone National Park. One respondent also questioned the cost effectiveness of providing additional campgrounds given the limited camping season.

In summary, past budgeting for campgrounds was the only problem area unanimously cited by the Forest Service respondents. Five respondents described current problems with budgeting for campgrounds

and past and current problems with private sector campground development. The other past and current problem areas included on the questionnaire were all cited by at least one respondent. Budgeting for campgrounds and various problems associated with private sector campground development were, then, the two problems most often mentioned for the Forest Service in the area, while the other problems were peculiar to individual national forests.

National Park Service response to the second question set was much less complex and diverse than Forest Service response. One respondent indicated that past agency campground policy and budgeting had allowed over-development which caused severe impacts from excessive overnight use. Both respondents cited a past problem with private sector campground development; one indicated that there had been no market, and the other mentioned low standards.

Both respondents indicated that current budgeting for campground maintenance has not always kept pace with needs. Both respondents also cited a problem with conflicts between the Park Service and other agencies regarding campground development. One indicated that Park Service policy will force campers out of the parks and into Forest Service, private or local campgrounds, and the other summed up his perception of the problem by indicating that each agency would prefer to see campgrounds developed on the other's land.

Both respondents indicated that there is a lack of private sector campground development. High land values, the short camping season, and competition from the parks were cited in explanation of

the problem.

Both of the state agency respondents indicated a past and current problem with budgeting for their campgrounds in response to the second question set, and one also cited past and current conflicts with federal agencies regarding budgeting and development expectations.

While responses to the second question set revealed a wide variety of past and current problems for the various agencies, past and current budgeting for campgrounds was the only consistent problem for all of the agencies.

The third set of questions regarding agency practices and policies also generated a wide variety of response, especially among the Forest Service respondents. Tables III and IV show Forest Service response to a question about past and current agency practices concerning five different policies in the GY/GT area. In only one instance were all eight respondents in agreement. They all indicated that in the past, the Forest Service encouraged but committed no money or other resources to the policy of developing private campgrounds on private lands in the vicinity of agency-administered land. Tables III and IV illustrate the fact that there was no general Forest Service policy regarding public and private campground development in the GY/GT area at the time the survey was made.

Responses to a question asking for formal documentation of past or current agency policies regarding campground development in the GY/GT area again reflected differences among Forest Service respondents. Three of them indicated that there was no formal documentation of

TABLE III

FREQUENCY OF CURRENT FOREST SERVICE PRACTICES REPORTED BY FOREST SERVICE RESPONDENTS
REGARDING FIVE CAMPGROUND POLICIES IN THE GY/GT AREA

Policies	Current Agency Practices			
	Encourages and Actively Committed Money or Other Resources to the Policy	Encouraged and Committed Only a Little Money or Other Resources to the Policy	Encouraged but Committed No Money or Other Resources to the Policy	Discouraged the Policy
Expanding public campground development on agency-administered land	0	4	3	1
Expanding public campground development on public land administered by other agencies	0	2	4	1
Developing private campgrounds on agency-administered land	2	1	2	3
Developing private campgrounds on public land administered by other agencies	0	1	3	3
Developing private campgrounds on private lands in the vicinity of agency-administered land	1	2	5	0

TABLE IV

FREQUENCY OF PAST FOREST SERVICE PRACTICES REPORTED BY FOREST SERVICE RESPONDENTS
REGARDING FIVE CAMPGROUND POLICIES IN THE GY/GT AREA

Policies	Past Agency Practices			
	Encouraged and Actively Com- mitted Money or Other Resources to the Policy	Encouraged and Com- mitted Only a Little Money or Other Resources to the Policy	Encouraged but Committed No Money or Other Resources to the Policy	Discouraged the Policy
Expanding public campground development on agency- administered land	6	0	2	0
Expanding public campground development on public land administered by other agencies	0	1	5	1
Developing private campgrounds on agency-administered land	1	2	1	4
Developing private campgrounds on public land administered by other agencies	0	0	4	3
Developing private campgrounds on private lands in the vicinity of agency-administered land	0	0	8	0

policy, and one did not respond to the question. The major program efforts mentioned by four respondents where documentation of policies could be identified included Operation Outdoors, Resources Planning Act programs, National Forest Outdoor Recreation Study Report, Inter-mountain Region Multiple Use Management Guides, draft CRMA Planning Guide, and the recently updated Forest Service Manual (FSM Interim Directive No. 8).

In fairness to the respondents, it is important to understand that the questionnaire was mailed at the end of July, 1977, and that both the draft CRMA Planning Guide and the Forest Service Manual Interim Directive No. 8 were issued only a month before, in June, 1977. It is possible that several of the respondents either were not in receipt of or had not yet examined these documents at the time they received the questionnaire. At the time of the survey, then, it remained to be seen whether or not these two documents would have any effect on the campground situation in the GY/GT area.

There was much less variation in response to the third question set by Park Service respondents than there was by Forest Service respondents. When asked to indicate past and current agency practices regarding five different campground policies, there was substantial agreement from both respondents. In the past, the agency encouraged and actively committed money or other resources to a policy of expanding public campground development on agency administered land; encouraged but committed no money or other resources to a policy of expanding public campground development on public land administered by other

agencies; and discouraged the policies of developing private campgrounds on Park Service or other publicly administered land. One respondent said the Park Service encouraged but committed only a little money or other resources to a policy of developing private campgrounds on private lands in the vicinity of Park Service administered land. The other respondent indicated that no money or other resources were committed to the policy.

The respondents agreed that current agency practices discourage the policies of expanding public campground development on Park Service land, developing private campgrounds on Park Service land, and developing private campgrounds on public land administered by other agencies. Both indicated that the policy of expanding public campground development on public land administered by other agencies is encouraged but that no money or other resources are committed to the policy. The policy of developing private campgrounds on private lands in the vicinity of the national parks is encouraged, and one respondent indicated that there was a commitment of a little money or other resources to the policy.

In summary, both respondents were substantially in agreement regarding both past and current agency problems and practices concerning campground development. Documentation of Park Service policies and practices were reported to be in the two national park master plans and in management objective statements.

State agency responses to the third question set dealt only with two individual state parks, and documentation did not go beyond citation of a state park study plan. For these reasons, a detailed

accounting of the state agency responses to this set of questions is not included.

The fourth set of questions, the most subjective set of the questionnaire, were included to acquire a perspective from agency officials regarding the future of campground policy in the GY/GT area. Again, some of the officials surveyed were responsible for formulation, while others were responsible for implementation of the campground policies of their agencies. Their responses to this set of questions, then, were substantially more than just opinions. The responses of the two federal agencies are reported first, followed by a brief summary of the state agency responses.

When asked to identify the public and private campground policies they would like to have established for the area, all of the Forest Service respondents indicated that some type of expansion would be desirable. For the public sector, one of them cited the previously mentioned Forest Service Manual policy statement, and one cited the draft CRMA Planning Guide. Two respondents indicated that they would like to see increased development of destination-type campgrounds. Another preferred development of facilities to specifically enhance national forest recreation opportunities, and one felt that the Forest Service should plan on a moderate increase in facilities to accommodate national park visitors who find the park campgrounds full. For the private sector, all eight respondents indicated that they felt private development should be encouraged.

These responses were consistent with the judgments by all respondents that there would be an increase in total campground

accommodation needs in the next five to ten years. Six respondents anticipated a moderate increase, one anticipated a great increase, and one indicated that he felt the need would increase only somewhat.

Three respondents indicated that they felt the public and private campground policies they would like to have established by the Forest Service would indeed be established. Three others declined to predict what policies would be established. One respondent predicted an increase in the number of fee campgrounds for the public sector, and a commitment of some public funds and resources to assist private development on public land. Another respondent predicted a continued de-emphasis of governmentally developed campgrounds, but an increase in funding for operation and maintenance of existing facilities. The same respondent indicated an expectation that the private sector would meet campground needs to the extent that it is economically practical.

Problems mentioned regarding the implementation of preferred or expected policies included funding and authorization problems, reluctance to develop campgrounds to accommodate visitors to another agency's resources, and public objection to paying higher fees in privately developed campgrounds. Three of the respondents felt that there would be no problems in implementing either preferred or expected public and private campground policies.

Table V shows the frequencies of Forest Service response to a question asking which of six private/public campground policies might be feasible for the GY/GT area.

TABLE V
NUMBER OF FOREST SERVICE RESPONDENTS
WHO FELT CERTAIN PUBLIC, PRIVATE CAMPGROUND POLICIES
WERE FEASIBLE IN THE GY/GT AREA

Policy	Number of Respondents
Expand <u>publicly</u> developed and operated campgrounds on <u>public</u> lands	8
Provide <u>public</u> financial assistance to <u>private</u> entities to develop and operate <u>private</u> campgrounds on <u>public</u> lands	2
<u>Publicly</u> developed campgrounds on <u>public</u> land, but <u>privately</u> operated	5
<u>Privately</u> developed and operated camp- grounds on <u>public</u> lands	5
Expand <u>privately</u> developed and operated campgrounds on <u>private</u> lands	7
Provide <u>public</u> financial assistance to <u>private</u> entities to develop and operate <u>private</u> campgrounds on <u>private</u> lands	3

The two policies least often cited as feasible dealt with public financial assistance to private entities. Only two respondents indicated that it was feasible to provide public financial assistance to private entities to develop and operate private campgrounds on public lands, while only three felt that it was feasible to provide the same assistance for development and operation of private campgrounds on private lands.

When asked to identify what public or private campground policies they would like to have established for the GY/GT area, the Park

Service officials responded in considerable detail. One indicated that the status quo should be maintained for public sector campgrounds, while federal grant funds should be used to encourage private development outside the parks. The same respondent indicated that he felt the status quo would be the campground policy for the next five to ten years, and that this policy combined with federal grant money would stimulate private campground development. The other respondent indicated that for the public sector, he would like to see some division between recreation vehicle and tent camps, a campground reservation system, some relocation or elimination of camps interfering with wildlife habitat, and fees raised so private camps can compete. This respondent predicted that these policies would be established in the next five to ten years. Regarding the private sector, this respondent indicated that he would like to see sanitation improved, but at the same time, private fees should be kept low enough to compete with public campgrounds. The same respondent felt that these policies would be established for the GY/GT area.

Some problems mentioned regarding implementation of the previously mentioned policies included: difficulty in developing a workable reservation system, public resistance to elimination of favorite campgrounds, private operator reluctance to keep fees low, difficulty in convincing people that they should camp outside the national parks or forests, and difficulty in obtaining federal grants for private development.

Neither respondent provided a need estimate for campground accommodations in the GY/GT area, but one judged that the need would

increase moderately while the other thought it would increase a little.

In response to the question regarding the feasibility of several public/private campground policies in the GY/GT area, neither Park Service respondent indicated that private campground development on public lands, with or without public financial assistance would be feasible.

One state agency respondent indicated a preference for a campground policy that would encourage private development of campgrounds, while the other preferred a public sector policy that would supply the states with federal funds for operation and development of campgrounds. Both respondents indicated that privately developed campgrounds on private lands would be feasible, and one also thought that both public and private development on public land would be feasible.

Both state agency respondents indicated that they expected an increase in future total campground accommodation needs in the GY/GT area in the next five to ten years. The first respondent expected the need to increase somewhat, while the second expected a great increase. The second respondent indicated a need estimate for an additional 100 first class camping sites, with more paved roads and flush toilets.

In summary, Forest Service response to the agency questionnaire delineated a number of campground problems, practices and policies common to all seven national forests in the GY/GT area. On the other hand, a clear and concise Forest Service campground policy statement could not be identified solely on the basis of the questionnaire responses. Several of the Forest Service questionnaire responses

were useful in identifying what documentation there was for campground policy in the GY/GT area. National Park Service questionnaire response, on the other hand, reflected problems and policies common to both of the national parks in the area. There was little consensus between the two state agency respondents regarding campground policy, except that the provision of camping accommodations is largely a federal responsibility.

Recent Public Agency Policy

Recent Forest Service Policy

Although recreation has been a recognized use of national forests for decades, it was not until 1960, with the passage of the Forest Service Multiple Use Sustained Yield Act, that outdoor recreation became an official primary forest use.¹ Several Forest Service respondents pointed out that during the Forest Service's Operation Outdoors Program in the 1960's, funds were available for construction and improvement of Forest Service campgrounds.

Historical background regarding general Forest Service campground development policy becomes of little significance in light of recent policy developments. The Forest and Rangeland Renewable Resources Planning Act (RPA) of 1974:

¹U.S. Department of the Interior, Bureau of Outdoor Recreation, The Recreation Imperative: The Nationwide Outdoor Recreation Plan, (U.S. Government Printing Office, 1974), p. 26.

. . . directs the Secretary of Agriculture to periodically assess the national situation of the forest and rangeland resources, and to submit, at regular intervals, recommendations for long-range Forest Service programs essential to meet future needs for those resources.²

Included in the RPA assessment and recommended program was a specific statement of Forest Service policy regarding campgrounds. Although the RPA recommended program declared a Forest Service emphasis on providing more dispersed recreation opportunities, it further stated that:

. . . some developed recreation will be needed on NFS land to support dispersed recreation. Also, a large segment of the public still favors use of NFS land for moderately developed recreation, such as campgrounds and picnic areas. . . the Forest Service will continue to provide its current share of these facilities.³

As was mentioned several questionnaire respondents, the RPA recommended program indicated that the private forest landowners would be given encouragement and assistance in providing public recreation opportunities.⁴

In summary, the RPA recommended program outlined a broad campground policy of encouraging private development and maintaining Forest Service campgrounds sufficient to provide for that agency's share of camper needs.

²U.S. Department of Agriculture, Forest Service, RPA Summary, A Summary of a Renewable Resource Assessment and a Recommended Renewable Resource Program, as Required by the Forest and Rangeland Renewable Resources Planning Act of 1974, p. 1

³U.S. Department of Agriculture, Forest Service, RPA, A Recommended Renewable Resource Program, as Required by the Forest and Rangeland Renewable Resources Planning Act of 1974, p. 632.

⁴Op. cit., RPA Summary, p. 16.

Once the RPA assessment and recommended program specified a general national program direction, plans were developed to give direction to specific areas managed by the Forest Service. One such plan, the draft CRMA Planning Guide (Preliminary), was issued in June of 1977. Five of the seven national forests in the GY/GT area were included in the draft area plan. The plan analyzed the role of the Forest Service in providing developed recreation facilities. In addressing the situation at the time of this study, the plan noted that private and public development had not kept pace with increasing use, and predicted an increase of 35 to 50 percent by the year 1995 in recreation use.⁵ It further noted, however, that dispersed recreation demand would increase at a much higher rate than demand for developed recreation, i.e., camping, and reiterated the RPA recommended program emphasis on dispersed recreation activities.⁶

There were three management goals specified in the program direction for the draft CRMA Planning Guide that would directly affect the campground development issue. The first stated that the Forest Service would:

. . . provide day use and overnight facilities needed by through-travelers on National Forest lands if other suitable lands are not available. Unless use at the site is closely related to the basic National Forest recreation resources, development and operation should be by State, local or private agencies.⁷

⁵U.S. Department of Agriculture, Forest Service, Central Rocky Mountain Area Planning Guide (Preliminary) (June, 1977), p. 16.

⁶Ibid., p. 12.

⁷Ibid., p. 26.

This management goal might be interpreted as a new willingness on the part of the Forest Service to allow for concessioner arrangements or special use permits for campground development. The second management goal indicated that the Forest Service would:

. . . encourage private sector development and operation of public recreational facilities adjacent to, and ⁸ compatible with, National Forest System management.

The plan further stated that the Forest Service would "maintain cost-effective, developed recreation facilities which do not conflict with non-Forest Service developments."⁹

The third management objective was to charge fees comparable to those charged by the private sector for similar facilities and services. It stated that the Forest Service will "develop overnight facilities to handle an additional 1,200,000 to 1,300,000 recreation visitor days use for through travelers by 1995" and . . . "overnight facilities to handle an additional 3.5 to 4.0 million recreation visitors days of National Forest use by 1995."¹⁰

These management objectives become somewhat more complex when combined with the synopsis statement of the appropriate role of the Forest Service in providing developed recreation facilities:

Maintain existing cost-effective, developed recreation facilities and provide new overnight facilities where the private sector cannot provide them. This will require development of facilities to handle about 10% of

⁸Ibid.

⁹Ibid.

¹⁰Ibid., p. 28

the anticipated demand by through-travelers and about 50% of the overnight needs of National Forest, dispersed area users.¹¹

The draft CRMA Planning Guide does not define "cost effective"; an omission that will become especially interesting when viewed in light of the financial feasibility schedules developed in the following two chapters. The policies, goals, and objectives stated in the draft CRMA Planning Guide left little doubt that an increase in Forest Service campground development would be necessary to meet the projected increased need for overnight accommodations in the GY/GT area. This did not necessarily conflict with the Forest Service policy of encouraging private sector development of campgrounds in the area.

Interim Directive No. 8 in the Forest Service Manual, issued June 14, 1977, clarified the relationship between the Forest Service and private campground developers. The Directive stated, in part, that:

. . . where economically feasible the private sector will be encouraged to develop and maintain, on National Forest System lands, needed public recreation facilities providing the long-term public interest is protected.¹²

The Directive further indicated that the Forest Service might develop or permit overnight facilities for visitors to nearby off-forest attractions "if cooperative land management planning indicates these lands offer the best location."¹³ It is possible that this policy

¹¹Ibid., p. 38

¹²U.S. Department of Agriculture, Forest Service, Forest Service Manual Interim Directive No. 8., Zero Code: 2300-Recreation Management, 2302.

¹³Ibid., 2303.1.

would be of use in the GY/GT area, given the enormous numbers of visitors attracted by the two national parks.

While the narrative section of the Directive indicates the possibility of additional development, two graphical presentations are included in the Directive that show (1) the Forest Service assignment of campground supply rates to various recreation entities and (2) the priorities given by the Forest Service to various recreation efforts. In delineating the supply roles of recreation entities, on the other hand, the Directive showed the Forest Service role in supplying campgrounds for through travelers as very low, and in supplying destination campgrounds for external attractions as low. The Forest Service role in supplying destination campgrounds (presumably for Forest Service attractions) was shown as being high.¹⁴

Similarly, priorities for recreation efforts by the Forest Service showed allocation of National Forest lands for destination campgrounds as high priority, for destination campgrounds for external attractions as low priority, and for campgrounds for through travelers as very low priority. However, concessions on National Forest lands for these uses received a relatively high priority.¹⁵

The Directive stated a policy of coordinating recreation planning with adjacent private landowners and public agencies. It further emphasized a policy of avoiding "facilities financed by the Forest

¹⁴Ibid., 2303.1--4.

¹⁵Ibid., 2303.2

Service where existing or planned private developments are capable of meeting public needs."¹⁶ The Directive explicitly allowed for concessioner operations, and stated that the Forest Service would "endeavor to attract and assist private entrepreneurs in the provision of needed recreation facilities and opportunities on National Forest System land."¹⁷ Further, the Forest Service would "generally maintain a natural setting on camp and picnic sites, placing less emphasis on convenience facilities, such as hot showers."¹⁸

In summary, the RPA assessment and recommended program, the draft CRMA Planning Guide, the Forest Service Manual Interim Directive No. 8 delineated specific but complex Forest Service policies regarding both private and public campground development. It is difficult, at best, to reduce the Forest Service programs, policies, goals, management objectives, planning procedures, and specific development priorities into a concise statement of just what the Forest Service might be expected to do concerning campground development in the GY/GT area.

It appears that the Forest Service will have to expand the number of camping units in the GY/GT area, if, as stated in the RPA Assessment, the agency is to "continue to provide its current share of facilities."¹⁹ This development could come in the form of concessioner operations or

¹⁶Ibid.

¹⁷Ibid.

¹⁸Ibid.

¹⁹Op. cit., RPA Assessment.

special use permits, or the Forest Service could develop and operate its own new campgrounds. Some of the increase could also come in the form of expansion of existing campgrounds. It further appears that the Forest Service will continue to operate campgrounds that are much less convenience-oriented than are most private campgrounds in the area.

Recent Park Service Policy

Campground development policy for the two national parks in the area was surprisingly easy to document. While both parks have operated campgrounds for many years, both Park Service respondents indicated that the NPS Mission 66 program in effect from 1956 to 1966 was the policy base for the most recent development of campgrounds in the National Parks. One of the respondents indicated that evidence of over development became obvious later in the 1960's. As a result, current NPS policy limits the capacity of both parks.

The Grand Teton National Park Master Plan states that overnight accommodations will be held to levels not exceeding those reached in 1971 within the park.²⁰ The plan further states that this policy will favorably affect the economies of nearby communities, "as has been demonstrated by the rapid increase in commercial campgrounds in the last three years."²¹ The Plan further recognizes that the development ceiling placed pressure on the national forests adjacent to the park, and endorses a coordinated regional planning effort.²²

²⁰U.S. Department of the Interior, National Park Service, Final Environmental Statement, Master Plan, Grand Teton National Park, 1975, p.5.

²¹Ibid., p. 26.

²²Ibid., p. 13.

The Yellowstone National Park Master Plan also declares a moratorium on additional overnight accommodations within the park.

The Plan further states that:

. . . every encouragement and assistance should be given to the development of visitor overnight accommodations outside and within an hour's driving distance of the park. Means should be explored whereby the portal cities might receive planning and development assistance.²³

In summary, the Park Service campground policy for the GY/GT area indicates that there will be no new development of campground facilities within the parks. It was recognized by both Park Service questionnaire respondents and by both park master plans for both parks that this policy will increase the pressure on the Forest Service and the private sector to provide campground facilities for visitors to the GY/GT area. Both master plans endorse a regional planning effort to facilitate the necessary development.

In 1970, 23,000 acre tract of land joining the two national parks was transferred from the Forest Service to the Park Service, and it was designated the John D. Rockefeller, Jr. National Memorial Parkway. It has been and is managed as a National Recreation Area. The Forest Service allowed, when that agency administered the land, the development of two rather large private campgrounds under special use permits. At the time of this study, both of those campgrounds were still operating in the Parkway. The Grand Teton National Park Master Plan indicates that existing land uses in the Parkway will be allowed to

²³U.S. Department of the Interior, National Park Service, Yellowstone Master Plan, p. 29.

continue.²⁴ However, a separate Parkway Master Plan is presently being prepared. There was no indication by Park Service officials that the Parkway Master Plan would call for additional campground development within the Parkway.

State Agency Policy

While one state agency respondent did not cite any policy that would assist in providing accommodations for national park and forest visitors, the other respondent indicated a willingness on the part of his agency to develop and operate additional campgrounds, providing that the federal government supply needed funds. Both agency respondents appeared to agree with a policy of encouraging private campground development in the GY/GT area.

Summary

To summarize the results of the study effort to explicitly define and document past and current agency campground policies in the GY/GT area, it should first be noted that the policies of the two major federal agencies and state agencies in the area all encouraged private campground development in the area.

NPS Summary

After a decade of increasing development, the Park Service issued plans to hold campground development within the two national parks at pre-1972 levels. It had not yet been officially stated what campground development policy will be instituted for the John D. Rockefeller, Jr.

²⁴Op. cit., Grand Teton Master Plan, p. 24.

National Memorial Parkway at the time this study was conducted.

Forest Service Summary

After budgetary constraints for a number of years had prohibited new Forest Service campground development, it appears that there will be a new initiative to develop a limited number of campgrounds within the national forests in the GY/GT area. Despite the complex priority system built into the new Forest Service policies, some new development or expansion will be expected if the agency is to meet its expressed goal of continuing to provide accommodations for its share of visitor needs. This development could come in the form of concessioner operations, support facilities development, or direct Forest Service development and operation of campgrounds. It should be noted, however, that the new Forest Service program and policies only serve as guidelines to the individual forest supervisors. Development plans for the individual forests in the GY/GT area will have to be completed before a firm indication can be obtained regarding the intent of the Forest Service to construct additional campground capacity in the area.

State Agency Summary

It appears that state agencies will not be providing additional campground facilities in the GY/GT area unless federal funds are supplied for development and operations. The respondents from the two states tended to view the need for additional campgrounds in the GY/GT area as a federal agency problem created by nonresident visitors being attracted to the area to participate in recreation activities or to view scenic attractions on federal lands.

CHAPTER IV

CAMPGROUND DEVELOPMENT, MAINTENANCE AND OPERATION COSTS

Although public agency practices and policies in the GY/GT area were undoubtedly important factors in both public and private campground development decisions, financial considerations were almost certainly the most important factors in private decisions. Public agency respondents' reflections on budgetary problems indicated that financial considerations were also a very important part of public decisions regarding campground development.

Forest Service Costs

Construction costs for this phase were based on a hypothetical 100 unit campground and were synthesized from cost data supplied by the Forest Service. A recreation specialist from one of the forests in the study area assisted with the development of the hypothetical campground and with the calculation of the associated costs. These costs were supported by figures included in the Forest Service RIM Handbook.¹ The typical Forest Service campground facility in the GY/GT area included an access road into the campground, individual parking spurs with tables and fireplaces, garbage cans, water, and vault-type toilets. While Forest Service campgrounds in the GY/GT

¹U.S. Department of Agriculture, Forest Service, Forest Service Handbook TITLE 2309.11 - RIM Handbook, Region 2 Supplements No. 34, 32 and 29.

area were considerably smaller on the average than the 100 unit size used in this study, this size was representative of the average private campground in the area. The hypothetical Forest Service campground was based on 100 camping units to provide cost estimates that would be comparable to the cost estimates calculated for the average private campground. According to Forest Service standards, a 100 unit campground would require a minimum of 40 acres of land; the acreage figure that will be used in the following analysis unless otherwise specified.

As synthesized, a 100 unit campground located on 40 acres with the facilities mentioned above and a one-mile gravel access road would cost \$330,000 to develop. The 40-acre land base is the minimum necessary for a campground of 100 units, according to Forest Service recreation specialists. Table VI shows the development costs obtained from the 1975 RIM Handbook for the same size campground with the same facilities.

The difference between the RIM estimated total cost of \$208,100 and the synthesized estimate of \$330,000 can be attributed to the more recent or updated costs provided by the local forest office. When 10 percent a year is added to the RIM costs to account for inflation and cost increases, the 1977 probable minimum becomes \$154,130 and the probable maximum becomes \$337,262. The average cost, again inflated by 10 percent for each of 2 years, becomes \$251,803. Since the synthesized estimate of \$330,000 falls between the updated RIM probable minimum and maximum costs, it could be assumed that a 100 unit Forest Service campground could very well cost in the vicinity of \$330,000 to

construct. Because the Forest Service campgrounds in the area were smaller than 100 units, exact construction costs were unavailable. For this study a figure of \$290,902, which represents the average of the synthesized cost and the RIM estimated cost in 1977 dollars, was used in analyzing Forest Service costs. It should be remembered, however, that this estimate is conservative, and that costs could easily exceed the \$330,000 synthesized cost, depending on the location of campground and individual construction requirements.

TABLE VI
RIM ESTIMATED REGION 2 CONSTRUCTION COSTS
IN 1975 DOLLARS FOR A USFS
100 UNIT CAMPGROUND^a

Facility	Costs		
	Probable Minimum	Probable Maximum	Average
Parking spurs	\$19,000	\$42,500	\$30,750
Tables (concrete base, wood plank)	15,000	22,500	18,750
Fire rings	5,000	9,000	7,000
Garbage cans	2,500	4,000	3,250
Water system ^b	15,100	37,500	26,300
1 mile gravel road	40,000	90,000	65,000
4 vault toilets (4 seat)	40,000	72,000	56,000
Fee collection station	700	1,200	950
2 signs	80	120	100
TOTAL COSTS	\$137,380	\$278,280	\$208,100

^aThe RIM Handbook specifies that the costs include all known direct and indirect project costs.

^bFor the purpose of this example, the water system was assumed to be comprised of a 100-foot deep, 6-inch diameter cased well, 1,000 feet of 2-inch PVC distribution line and 25 hand-type pumps.

If the newly constructed \$290,902 Forest Service campground was assumed to be safe and sanitary, the RIM Handbook specified that annual maintenance cost to keep the facility new or like new could not exceed 10 percent of replacement cost. Maintenance costs for a \$290,902 campground might run, then, anywhere up to \$29,090 per year. Maintenance in this case does not include garbage pick-up or sanitation costs, but rather costs to maintain the facilities themselves. It is reasonable to assume that maintenance costs for the hypothetical Forest Service campground would fall somewhere between the one and ten percent allowed in the RIM Handbook. For this study, maintenance costs were calculated as moderate: 5 percent of the replacement cost, or \$14,545.

In order to complete the cost profile for the Forest Service campground, it was necessary to develop an estimate of the operation costs, which included fee system costs, law enforcement costs and clean-up costs. Since there were no 100 unit Forest Service campgrounds operating at the time of this study, approximate costs were developed from actual RIM Facility Condition records. 1976 records were used, and the figures were inflated 10 percent to 1977 costs.² The costs may be somewhat higher than would actually apply to a 100 unit Forest Service campground, since there should be considerable economies of scale accruing to a large campground in fee collections, clean-up, and law enforcement costs. The cost range estimated from

²RIM Facility-Condition Records for the National Forests in the GY/GT area, 1976 (Mimeographed).

actual RIM Facility-Condition reports for these administrative and operation services for a 100 unit Forest Service campground was from \$10,000 to \$15,000 a year total, depending on the amount of use the campground received. For this analysis, an average figure of \$12,500 was used.

Table VII presents the cost profile for the Forest Service 100 unit campground developed for this feasibility analysis. It should be noted that if the Forest Service were to build and operate a campground of this size, it would probably be necessary for them to employ a full-time seasonal attendant for the facility, which would result in some increase in the annual operating costs shown in Table VII.

TABLE VII
ESTIMATED TOTAL AND PER UNIT FOREST SERVICE COSTS
FOR CONSTRUCTING, MAINTAINING, AND
OPERATING A 100 UNIT CAMPGROUND

Item	Total Cost	Per Unit Cost
Development and construction cost	\$290,902	\$2,909
Annual maintenance cost	14,545	145
Annual operating cost	12,500	125

Park Service Costs

The Denver Service Center Estimating Section estimated that a fully developed Park Service campsite in 1977 would cost \$2,835 to construct, including comfort stations, road and parking, and utilities.³

³National Park Service Class "C" Estimates for July 1976 through October 1979, p. 12. (Mimeographed).

Again, an estimate of construction costs was used since there had been no new campgrounds developed in the two national parks in the GY/GT area during several years prior to this study. Development and construction costs for a hypothetical 100 unit fully developed campground for the Park Service were approximately \$283,500. For a 100 unit campground with the same specifications as the 100 unit Forest Service campground, Park Service construction costs were estimated to be \$207,155 as shown in Table VIII.

TABLE VIII
ESTIMATED CONSTRUCTION COSTS IN 1977 DOLLARS
FOR A 100 UNIT NPS CAMPGROUND

Facility	Cost
Parking spurs	\$52,560
Tables	12,150
Fireplaces	10,125
Trash receptacles	8,100
Water system	20,250
1 mile gravel road	64,800
4 vault toilets	38,880
2 signs	<u>200</u>
TOTAL COSTS	\$207,155

It is likely that the discrepancy between estimated Park Service construction costs and Forest Service costs for the same campground specifications was due to the fact that the Park Service Class "C" estimates are very general estimates and are developed on a nationwide

basis. It is likely that the cost profile shown in Table VIII is somewhat low, since Park Service campground construction in the rugged GY/GT area might be expected to cost more than construction in parks in other parts of the country. The \$207,155 cost figure, then, should be considered a very conservative estimate.

Actual operation and maintenance costs for Park Service campgrounds were supplied by the maintenance division at Yellowstone National Park.⁴ It was pointed out that there are two different types of campgrounds in the park, with differing operation and maintenance costs.

The first type of campground averaged 400 fully developed units, with oil pads, adjacent water, and heated flush comfort stations. This type of campground cost \$35,000 to \$36,000 to maintain and operate. The second, less developed type of campground had from 50 to 128 units; some with oil pads and some with walk-in type tent pad facilities, with pit or vault toilets and water. The combined maintenance and operation costs for these campgrounds averaged \$12,000 a year. The per-unit maintenance and operation cost for the less developed campground, based on an average of 89 camp units, was \$134.83. From this figure it was extrapolated that a 100 unit minimally developed Park Service campground would cost \$13,483 a year to maintain and operate. Table IX presents the estimated costs for both types of Park Service campgrounds.

⁴Interview with Bill Armstrong, Maintenance Division, Yellowstone National Park, Mammoth, Wyoming, 24 October 1977.

TABLE IX

ESTIMATED TOTAL AND PER UNIT CONSTRUCTION, OPERATION
AND MAINTENANCE COSTS FOR TWO CLASSES
OF NPS CAMPGROUNDS

Item	Total Cost	Per Unit Cost
Development and construction cost		
Full development	\$283,500	\$2,835
Minimum development	207,155	2,072
Annual operating/maintenance cost		
Full development	9,000	90
Minimum development	13,483	135

It is noteworthy that while the fully developed Park Service campground cost more to develop and construct than the minimally developed one, it had lower operating and maintenance costs.

State Agency Costs

Table X presents the construction and development costs estimated by the Wyoming Recreation Commission for the same 100 unit hypothetical campground.⁵ One of the reasons that the Recreation Commission's estimated construction costs were lower than those of both federal agencies may be that state park personnel tend to do much of the labor themselves, and, as such, their costs may have been understated.

⁵ Interview with Bob Drobish, Wyoming Recreation Commission, Cheyenne, Wyoming, 18 November 1977.

TABLE X

ESTIMATED CONSTRUCTION COSTS IN 1977 DOLLARS FOR A
100 UNIT WYOMING STATE PARK CAMPGROUND

Facility	Cost
Parking spur with table, grill, and garbage receptacle	\$70,000
Water system	30,000
1 mile gravel road	35,000
4 vault toilets	40,000
2 signs	<u>200</u>
TOTAL COSTS	\$175,200

Recreation Commission estimated cost for a fully developed campground with a septic system, four flush restrooms, and hard-surfaced roads was \$3,510 per unit or \$351,000 for a 100 unit campground. Maintenance and operation costs were not available.

Comparison of Agency Costs

Table XI shows total and per-unit development and construction costs for the Forest Service, Park Service and Wyoming Recreation Commission, and Table XII presents Forest Service and Park Service operation and maintenance costs. Again, the latter were not available for the state agency campground.

There are a number of possible reasons for the large difference between the Forest Service and Park Service operation and maintenance costs. The RIM data from which the Forest Service figures were developed were not reflective of a 100 unit hypothetical campground,

TABLE XI
PUBLIC AGENCY CONSTRUCTION COST COMPARISON
FOR A MINIMUM DEVELOPMENT 100-UNIT CAMPGROUND

Item	USFS Cost ^a	NPS Cost	Wyo. Rec. Comm. Cost
Camp units	\$37,208	\$52,650	\$70,000 ^b
Tables	22,688	12,150	
Fireplaces	8,470	10,125	
Garbage receptacles	3,933	8,100	
Water system	31,823	20,250	30,000
1 mile gravel road	78,650	64,800	35,000
4 vault toilets	67,760	38,880	40,000
Fee collection station	1,150	NA	NA
2 signs	121	200	200
TOTAL COSTS	\$251,803	\$207,155	\$177,200
PER-UNIT COSTS	\$ 2,518	\$ 2,072	\$ 1,772

^aForest Service costs are an average of the 1975 RIM probable minimum and maximum costs, inflated by 10% for 1976 and 10% for 1977.

^bThis figure includes parking spurs, tables, fireplaces, garbage receptacles and lighting.

TABLE XII
ESTIMATED TOTAL AND PER UNIT USFS AND NPS
MAINTENANCE AND OPERATION COSTS
FOR A MINIMUM DEVELOPMENT
100 UNIT CAMPGROUND

Item	USFS Total Cost	USFS per Unit Cost	NPS Total Cost ^a	NPS per Unit Cost
Annual maintenance costs ^b	\$14,545	\$145		
Annual operating costs	12,500	125	\$12,000	\$120
TOTAL	\$27,045	\$270	\$12,000	\$120

^aNPS Figures include both operation and maintenance costs.

^bFigure comes from Table VII.

but rather of the actual smaller Forest Service campgrounds in the area. It is likely that these small campgrounds had higher per-unit maintenance and operation costs than a 100 unit campground would have. The figures in Table XII might also reflect additional costs generated by the relatively greater distances between Forest Service campgrounds than were found between the more accessible Park Service campgrounds. The data should not be construed to represent absolute costs, but rather estimates that should be useful for comparisons between public agency campgrounds and private sector campgrounds. It is noteworthy that up to this point in the study, public agency costs include no interest on loans or amortization costs, which the private sector must pay.

Private Costs

In order to examine the costs incurred by private campground owners or operators in the GY/GT area, it was first necessary to thoroughly describe the average private campground. Private campgrounds were typically located on much smaller parcels of land than were public campgrounds, and the range of services and activities they offered was much greater. As one of the private campground operators in the area described it, "our facilities are not for campers, but rather for people interested in 'mobile living.'"⁶

⁶Interview with Gene Brown, private campground owner, Jackson, Wyoming, 21 July 1977.

Table XIII is a composite of the facilities offered by the total of 16 private campground operators contacted in the course of this study. In addition to the facilities listed in the table, all of the private campgrounds had some units with direct electric hookups; all but one had direct water hookups for recreation vehicles; and all but two offered direct sewer hookups.

TABLE XIII

NUMBER OF CAMPGROUND OPERATORS OF 16 INTERVIEWED
OFFERING FACILITIES NOT FUNDED
IN MOST PUBLIC CAMPGROUNDS

Facility	Number of Campgrounds
Flush toilets	16
Showers	16
Laundry	15
Ice machines	15
Store	14
R.V. dump	13
Public phone	13
Playground	11
Recreation hall	10
Gas/propane	9
Swimming pool	5
Horseback riding	4

In order to develop costs comparable to those incurred by public agencies, a descriptive profile of an average private campground in the GY/GT area was developed (Table XIV).

Although the average private campground in the area offered many of the facilities listed in Table XIII, construction cost figures were developed only for those facilities directly related to the camping experience including parking spurs, utilities, tables, grills, garbage

cans, support buildings, and an access road. Except for flush toilets and showers, all of the facilities shown in Table XIII are income-producing items, and it was assumed that they at least pay for themselves. In addition to costs for clearing and leveling, camping pads, plumbing, electrical development, and campground equipment, costs were developed for a building to house the campground office and small equipment, and for two shower and lavatory buildings (Table XV). The "average" private campground described in Table XIV was used as the hypothetical campground on which the private campground costs were based.

TABLE XIV
PROFILE OF AN AVERAGE PRIVATE CAMPGROUND
IN THE GY/GT AREA

Item	Average	Minimum	Maximum
Age of campground	8.3 years	4 years	14 years
Length of present ownership	4.6 years	1 year	12 years
Number of units	104 units	23 units	244 units
Number of acres	10 acres	2 acres	44 acres
Units with electricity	57 units	23 units	123 units
Units with water	55 units	0 units	123 units
Units with sewer	36 units	0 units	123 units
Fees charged:			
Base fee	\$4.50	\$3.00	\$6.00
Electric hookup	.53	.00	1.25
Water hookup	.34	.00	.75
Sewer hookup	.42	.00	.75
Additional people ^a	.50	.00	.75

^aMost of the campground operators contacted charged an additional overnight fee if the camping party was larger than 2 persons. The fee charged for additional people in Table XIV reflects this charge.

TABLE XV
TOTAL AND PER UNIT COSTS OF CONSTRUCTION FOR A
104 UNIT, 10-ACRE PRIVATE CAMPGROUND
IN THE GY/GT AREA

Item	Total Cost	Per Unit Cost
Land and site preparation ^a	\$147,500	\$1,475
Plumbing, water, sewage and fixtures ^{b,7}	73,954	740
Electric installation, wire, poles ^c	9,213	92
Buildings	<u>32,100</u>	<u>321</u>
TOTAL COSTS	\$262,767	\$2,628

^aThis cost was developed for the typical private campground in the area, which is located on relatively flat, sparsely vegetated land. The figures include costs of clearing and grubbing, campground road, site construction, garbage cans, tables, and grills. The figure is based on an average of estimates furnished by private campground operators in the GY/GT area.

^bIncludes costs for a well, holding tank, pump, water lines, water heater, 2000-gallon septic tank and field, 55 water hookups, 36 sewer hookups and plumbing in the buildings. The figures were adjusted for price increases from a 1972 study.

^cIncludes electric hookups for 57 units.

⁷A. B. Sherling and E. W. McCoy, Costs and Returns of Overnight Campgrounds in Alabama (Auburn, Alabama: Auburn University Agricultural Experiment Station, 1972), p. 15; and Interview, Gerald E. Peyton, Civil Engineer, 15 September 1977.

The cost of land was not included in the development costs for the average private campground, but will be included when these costs are used to calculate breakeven schedules.

Costs of maintenance and operation (Table XVI) were considerably different for the private campground operators when compared to those costs incurred by public agencies. While the private campground owners had to pay taxes and insurance that were not expenses for the public agencies that operate campgrounds, most of the private owners saved on maintenance costs since they tended to perform most of the maintenance services themselves.

TABLE XVI
ANNUAL OPERATING AND MAINTENANCE COSTS
(EXCLUDING PERSONNEL COSTS) FOR
THE AVERAGE PRIVATE CAMPGROUND
IN THE GY/GT AREA^a

Item	Average Cost	Average Cost Per Unit	Minimum Cost ^b	Maximum Cost ^b
Taxes	\$1,472	\$14.15	\$ 250	\$2,500
Insurance	1,387	13.34	350	2,400
Advertising	1,961	18.86	5,449	250
Repairs and maintenance	5,596	53.81	10,000	2,000
Utilities	3,093	29.74	7,200	220
Office expenses	639	6.14	1,200	100
TOTAL COSTS	\$14,148	\$136.04		

^aThese cost estimates were furnished by the nine sample campground operators interviewed.

^bThese figures represent the minimum and maximum costs reported by the private operators; therefore, totals of these columns would have no meaning.

Although many of the campground operators did not allow for set annual returns to management (or family labor), these costs are a very real part of annual operating expenses. Table XVII adds the annual costs necessary to complete the private campground owner's total maintenance and operation cost profile.

TABLE XVII
TOTAL OPERATION AND MAINTENANCE COSTS FOR THE
AVERAGE PRIVATE CAMPGROUND OPERATOR
IN THE GY/GT AREA

Item	Total Cost	Cost Per Unit
Operation and Maintenance Costs ^a	\$14,148	\$136.04
Return to management ^b	15,000	144.23
Hired labor ^c	<u>7,200</u>	<u>69.23</u>
GRAND TOTAL	\$36,348	\$349.50

^aExcluding personnel costs.

^bSince an average of 3 family members work without a fixed salary in private campgrounds in the GY/GT area, an allowance was made for a \$15,000 family income.

^cCost for 3 people, 120 days, at \$2.50 an hour.

CHAPTER V

COMPARISON OF PRIVATE AND PUBLIC CAMPGROUND COSTS

Private Feasibility Schedules

To assess the economic feasibility of private and public campgrounds operating in the GY/GT area, it was necessary to develop breakeven fees for both types of campgrounds, under a variety of conditions. The most important factor in this analysis, which has not yet been considered, was the amount and cost of land required for campground development.

The analysis which follows was based on a 120-day camping season, an average maximum period for campgrounds in the GY/GT area, beginning after May 15 and ending before September 15. For the average private campground of 104 units, this season provides 12,480 site days available for rental. The average occupancy rates for the 9 sample campgrounds were: 18.5 percent for the last half of May, 50 percent for June, 81 percent for July, 76 percent for August, and 18.5 percent for the first half of September.¹ When these rates were applied to

¹These capacity figures document the short camping season that has been previously cited as an obstacle to private sector development of needed campgrounds in the area. While the 81 and 76 percent occupancy rates for July and August may raise doubts about the validity of earlier statements that claimed all camping units were filled by early afternoon in some areas and that late arriving campers frequently had to be referred to campgrounds up to 100 miles away, based on information obtained during the interviews, the problem of inadequate camping facilities was limited to the two parks, the Jackson Hole area of Wyoming, and to other isolated areas. Those gateway communities other than Jackson either did not fill or filled infrequently over the course of the summer. The travel distance involved to reach some of these areas may make them impractical for some park travelers.

the average campground with 104 units, the result was that 7,160 total units were rented during the season, or that there was an average occupancy rate of 57 percent. In other words, 59 of the 104 available campsites in the average campground would have been rented every day of the 120-day season.

Up to this point, the cost of land has not been considered in either the private or public campground cost schedules. The land cost is and will be an important cost component, especially in the GY/GT area where development potential has driven land prices to a relatively high level. For example, the price of undeveloped land in the Jackson, Wyoming area was reported as going for upwards of \$15,000 per acre.² While the Jackson area had the highest priced land in the study area, the privately owned lands in the other gateway corridors with the location and topographic features suitable for campground development could probably not be purchased for prices much below the \$5 to \$7 thousand an acre range. The importance of land costs to future campground development was dramatized in the discussions with the campground owners and managers contacted during this study. Almost all of the contacts volunteered in response to a question about future development plans that the cost of land would prohibit them from expanding. They questioned whether a new campground could be financially feasible if land had to be purchased at the prevailing land prices.

²John Carlson, Land Prices in Teton County, 1977, (mimeographed).

For purposes of this analysis, land values were considered at \$5,000 and \$10,000 per acre. The cost of the land was brought into the cost calculation in terms of a charge or allowance made for a return on investment. A nine percent rate of return was used to calculate the return on investment allowance or land cost figures shown in Table XVIII. The land cost estimates are also affected by the density at which the campground is developed. The cost estimates in Schedule A, Table XVIII, were based on land that cost \$5,000 an acre and developed at a density of 10.4 units per acre (104 units on 10 acres). The estimates in Schedule B were based on the same land cost but developed at a density of 2.6 units per acre (104 units on 40 acres). Schedules C and D were based on a land cost of \$10,000 per acre with development densities of 10.4 and 2.6 units per acre, respectively.

The \$5,000 and \$10,000 per acre land values used in calculating these estimates were selected as being conservative estimates of the range of land prices that would have to be paid if land were to be purchased in the study area to construct a new campground. The high density campground (104 units on 10 acres) reflects the average density of development of the private campgrounds contacted during the study (Table XIV). The low density example (104 units on 40 acres) represents the density of a typical public agency campground.

The two development densities were included in the study for two interrelated reasons. First, use of the different densities dramatizes the effect of the cost of land on the fee schedule that would have to be charged if campground owners were to recover their investment.

TABLE XVIII

PER UNIT COSTS AND BREAK-EVEN FEES AT DIFFERENT OCCUPANCY
RATES FOR THE AVERAGE PRIVATE CAMPGROUND
IN THE GY/GT AREA

Cost Items	Annual Costs Per Camping Unit			
	Schedule A ^a	Schedule B ^b	Schedule C ^c	Schedule D ^d
Construction ^e	\$287.94	\$287.94	\$287.94	\$287.94
Operation and maintenance	349.50	349.50	349.50	349.50
Land cost	<u>43.27</u>	<u>173.08</u>	<u>86.54</u>	<u>346.15</u>
TOTAL ANNUAL PER UNIT COST	\$680.71	\$810.52	\$723.98	\$983.59
BREAK-EVEN FEE ^f				
at 57% occup.	\$ 10.01	\$ 11.92	\$ 10.65	\$ 14.46
at 60% occup.	9.45	11.26	10.06	13.66
at 65% occup.	8.73	10.39	9.28	12.61
at 70% occup.	8.10	9.65	8.62	11.71

^aSchedule A is based on a 104 unit campground on 10 acres at \$5,000 per acre land cost, and annual land cost of 9%. This cost profile is indicative of the private campground situation as it existed at the time of this study.

^bSchedule B is based on a 104 unit campground on 40 acres at \$5,000 per acre land cost. It must be noted that increasing the campground land base would also increase construction costs to some extent. This increase is not reflected in the analysis.

^cSchedule C is based on a 104 unit campground on 10 acres at \$10,000 per acre land cost.

^dSchedule D is based on a 104 unit campground on 40 acres at \$10,000 per acre land cost.

^eConstruction cost includes depreciation plus an allowance for return on investment. Sinking fund method was used to compute depreciation and return for a 20-year life of depreciable assets:

$$\text{Annual Unit Cost} = P_i + \frac{(P - L) i}{(1 + i)^n - 1}$$

where P = per unit cost of construction, L = ending value of 0, i = interest of 9%, and n = the number of years depreciated.

Second, it is hoped that the cost estimates will highlight an important issue in the provision of future camping facilities in the GY/GT area that will not be addressed in this study. This issue relates to the type of camping experience that will be provided for in the design and construction of future campgrounds. If, as several campground operators noted, the camping public can be divided into two general (but oversimplified) types, those parties seeking a camping experience and those satisfied with a mobile living experience, then some attempt will have to be made to provide camping facilities suited to each type. This is especially true if the public agencies are going to be responsive to the camping preferences of local and out-of-area camping parties. In the past, the public agencies have developed campgrounds with sufficient space between units, or have used the terrain or vegetation available in the area, to screen one unit from the next to give the effect of isolation or privacy between any two camping parties. Private campgrounds have generally been designed with facilities and convenience in mind, and while the private operators are just as concerned about providing "nice" facilities as are the public agency managers, they have not attempted to create a camping atmosphere in most cases.

Commercial campgrounds have been successful because a portion of the camping public has an apparent preference for facility conveniences

^f The breakeven fee is calculated by dividing the annual cost per unit by the number of sites rented for 120 days at the different occupancy percentage rates. For example, the cost of \$680.71 at 57 percent occupancy is: $120 \text{ days} \times .57 = 68$, $680.71/68 = 10.01$, the breakeven fee for these circumstances.

over the more spacious areas generally available in public campgrounds. Indeed, one of the reasons why private campground operators can offer a high level of developed facilities within a range of acceptable costs is because they have been able to concentrate their camping units into a relatively small area. When the construction economies gained in locating the camping units close together are contrasted with the fourfold increase in the land cost per camping unit when density is decreased from 10.4 units to 2.6 units per acre, it appears unlikely that commercial campgrounds will be developed that will offer a camping experience comparable to the opportunities that exist in most public campgrounds. As indicated, this study effort has raised a concern that the policies adopted by state and federal agencies to look to and encourage private development of present and future needed campgrounds should be examined against the type of camping experience that would likely be provided. They should also explicitly decide whether the expected results are consistent with and acceptable to the agencies' recreation development responsibilities.

The construction cost figure of \$287.94 that appears in Table XVIII is based on the depreciation costs and return on investment costs associated with actual development of the campground. The operation and maintenance cost figure in Table XVIII was taken from Table XVII.

A summation of the construction, operation and maintenance, and the land cost components yields the estimate of total annual cost per camping unit. As shown in Table XVIII, these estimates run from a low of \$680.71 per unit to a high of \$983.59 per unit, depending on the

value of the land the density of development or spacing of the camp-sites. With a seasonal occupancy rate of 57 percent, each camping unit would be rented an average of 68 days. In other words, the campground operator would have to set his camping fees so that all costs could be covered from 68 days of rental income if he just wanted to break even. Using the per-unit cost of \$680.71 from Schedule A, the breakeven fee would be \$10.01 per night if the operator were to cover his costs with an average rental of 68 days out of the 120-day season. If the campground operator could increase the percent occupancy figure over the season, he could charge proportionally lower fees and still break even. For purposes of illustration, breakeven fees are shown in Table XVIII for 57 percent, 60 percent, 65 percent, and 70 percent seasonal occupancy rates for each of the four cost schedules.

Although a seasonal occupancy rate of 57 percent, or even 70 percent, might appear to be low to someone not associated with the operation of a campground, it is not. When one takes into account the characteristically short tourist season for the GY/GT area (over 70 percent of all camping unit rentals were attributable to the months of July and August) there were many empty units both before and after the peak season that pulled the occupancy figure down. At 70 percent occupancy, for example, each unit would have to be rented 84 days out of the 120-day season. As seasonal as visitor patterns are for the study area, a 70 percent occupancy rate would probably mean that July, August, and a good share of June would have to be completely rented out.

This situation existed in the Jackson area at the time of the study, and while it is a situation that benefits established campground owners and operators, it is not a desirable situation for those campers that arrive in the area late in the day after all campgrounds have filled.

Based on the data supplied by the campground operators that were contacted, the average fee charged for one night's rental of a camp unit in the GY/GT area was \$6.79. All of the private campground operators contacted charged a base fee for two people, and then added a fee per extra person. The \$6.79 figure is based on an average camping party size of 4 persons, which was the most common party size used in the campground studies reviewed.³ When this fee is compared with the breakeven fees listed in Table XVIII, it appears that at the rates charged at the time of this study, campground owners in the area were not covering all their costs.

To the extent that the cost estimates that have been calculated are representative of the actual or true costs incurred by the private campground operators in the area, most of them would show a loss on their campgrounds if they actually had to pay all of the expenses included in the cost calculations. In reality, they do not pay some of the costs that were charged to them, and they also receive financial benefits that have not been accounted for as yet.

The first explanation for the disparity deals with the cost of land in the area. Since the study analysis is concerned with

³Robert L. Wilder, Campground Development Guide (Oregon: Oregon State University Resource Development Section, Extension Service, 1973), p. 45.

development costs for a new campground, the land cost figures are undoubtedly much higher than would be the case where land was purchased five to ten years ago. A number of the private operators in the area indicated that they had owned their land for many years. In fact, it was apparent that many of the operators owned their land free of debt, and they were not concerned with interest and mortgage payments. Further, they did not consider that they should be receiving a financial return on their land investment.

Another possible explanation for the difference between the computed breakeven fee and the actual average fee charged is that the average occupancy rate of 57 percent did not hold over the entire GY/GT area. In the Jackson and Cody areas some campground operators reported two full months of 100 percent occupancy, while those in West Yellowstone, Gardiner, and Livingston and the surrounding areas reported lower occupancy rates. Although both length of land ownership and varying occupancy rates may account for some of the fee discrepancy for private operators in parts of the GY/GT area, they do not explain how newer campgrounds in locations outside the Jackson and Cody areas stay in business.

Other possible explanations deal with the handling of returns to management and the amount of work performed by the operator. Eleven of the sixteen campground operators contacted did not pay family labor, and did not pay fixed salaries to themselves. The \$15,000 return to management allowance used in this analysis may be somewhat higher than the actual average return to management. Further, the

construction and maintenance costs for the average private campground were developed largely on contracted costs. In reality, most of the private operators in the area performed at least some, and in some cases all, of the construction and maintenance required themselves. Moreover, the cost of constructing a campground five to ten years ago would have been substantially lower than at the time of the study, which would reduce the allowance made for depreciation. Also, if through their maintenance programs the campground operators were extending the useful life of facilities and equipment beyond the 20 year period used for depreciation purposes, the depreciation allowance used in this analysis would be overstated.

Another possible explanation for the fee discrepancy deals not with breakeven fees, but with supplemental sources of income. Most of the campground operators in the area reported that they offer a variety of services and products in addition to the basic camping facilities. Stores, laundries, and recreation halls were all operated by a majority of the private campgrounds in the area. While it is likely that they were important components of most campground businesses in the area, neither the costs of these facilities nor the income they generated were included in this analysis. Campground operators were asked, nevertheless, to estimate the percentage of their total business receipts from sources other than campsite rental. Only six of the operators were able to provide an estimate. The average percentage of receipts from services other than campsite rental for those six was 48 percent. In many cases, the camp stores, laundries,

and recreation halls were open year round and catered to local patrons as well as summer campers. This was especially true in the West Yellowstone and Gardiner areas. It is possible, then, that some private campgrounds in the areas that experienced lower occupancy rates were being financially "carried" by supplemental sources of income. Despite this possibility, the success of a private campground should not depend on supplemental income.⁴

It is noteworthy that a number of private campground operators volunteered that their campgrounds were losing money; several others indicated that it had taken a number of years to build up sufficient business to make their campgrounds pay for themselves. It should also be noted that many campground operators regard financial return as a small segment of the rewards they gain.⁵ Dice and Wang pointed out that while private campgrounds do not produce significant returns on investment unless combined with other services, a large portion of private campgrounds "are operated as hobby-type enterprises rather than for highest economic returns."⁶ Living in a scenic area and enjoying working with people were among the nonfinancial rewards mentioned by private campground operators in the GY/GT area.

In short, the camping fees charged by private campground operators

⁴Op. cit. Bevins et al., p. 5.

⁵Tommy L. Brown and Bruce J. Wilkins, A Study of Campground Businesses in New York State (New York: Cornell University, Department of Natural Resources, 1972), p. 22.

⁶Eugene F. Dice and Darsan Wang, A Study of Expenditures and Management (Michigan: Michigan State University, Cooperative Extension Service Bulletin E-756, 1973), p. 12.

in the GY/GT area could be below the breakeven fees calculated in this study for any one or a combination of the reasons mentioned above. The apparent ability of the private campground operators to survive and perhaps even prosper with a lower fee schedule should not be interpreted as an indication that the cost schedule determined in this analysis is too high. The focus of this study is in the feasibility of private investment providing the campgrounds that were needed at the time of the study in some parts of the GY/GT area, and those campgrounds that will be needed in the future. Most of the existing campgrounds at the time of this study were developed five to ten years earlier when land values and construction costs were lower. This permitted the campgrounds to operate with lower fees than the breakeven fees that were determined in this analysis, but these facts will not be of benefit to new campgrounds that have to face the higher costs. In an economic context, campground operators were willing to operate their businesses on an income that was not covering their true economic costs. That is, it appears that the land being used for most of the campgrounds could be sold or put into some other use and the operators would realize a greater return on their investments than they were receiving at the time of the study. Under these circumstances it is understandable why private capital has not been attracted into the development of new campground businesses.

Public Feasibility Schedules

Feasibility schedules for the Park Service were not developed, since it is Park Service policy to not allow new campground development, either public or private, in the two national parks in the study area. Since the Forest Service is the only public agency in the area that is likely to add campground facilities in the near future, feasibility schedules were developed for the 100 unit Forest Service campground that was previously described. For the Forest Service analysis, an occupancy rate of 100 percent was used for June,⁷ July and August, and a rate of 50 percent was used for the second half of May and the first half of September. Although the 50 percent figure was a very rough estimate, the federal campgrounds were reported as being full during the three mid-summer months. Using a 120-day season, there are 12,000 site days available for the hypothetical 100-unit Forest Service campground. The occupancy percentage yields an average of 88 units occupied for every day of the 120-day season.

Table XIX presents the annual costs for the 100-unit public campground in the GY/GT area, and uses the occupancy rates described above

⁷A June occupancy rate of 100 percent for the public campgrounds as compared to the 50 percent rate for the private campgrounds is noteworthy. If the public campgrounds do in fact fill up during June as well as in July and August, in contrast to the 50 percent occupancy rate for June among private campgrounds with July's rate going up to 81 percent and August with a 76 percent rate, it suggests that the camping public was choosing the public camping sites first and then going to the private campgrounds after the public campgrounds were full. This situation may be symptomatic of one of the problems that limits the development of needed private camping facilities. This problem relates to the low fees charged by the public agencies for overnight camping, and may indicate that despite the different characteristics of private and public campgrounds, they may still be in direct competition with one another.

to compute fees that must be charged under each set of circumstances to break even. Table XIX, much like Table XVIII that described breakeven fees for private campgrounds, presents a set of four public campground scenarios or schedules, and the costs related to each. Schedule A presents construction costs computed for cost recovery over a 20-year period, not considering interest or depreciation. In other words, the \$125.90 figure was arrived at by simply dividing the \$290,902 Forest Service construction cost by 100 to get the \$2909.02 unit cost, and then dividing that figure by 20 years, the expected life of the assets built. The construction costs in Schedules B, C and D include 20-year depreciation plus allowance on return on investment. Interest of 9 percent was used both for the construction costs and for the land costs in Schedules C and D instead of the federal discount rate of 6-7/8 percent in order to make the public agency cost more readily comparable to private costs. The maintenance and operation costs in Table XIX are taken from Table VII.

Land costs are included in Schedules C and D, and it is these two schedules that are the most easily compared to private campground costs found in Table XVIII. Although public agencies do not actually purchase land for their campgrounds in the sense that private developers do, land committed to campground development by the agencies is not realistically without cost as it is shown to be in Schedule A and Schedule B. There is an opportunity cost associated with the permanent commitment of land by public agencies. For example, the cost might be the value of that same land committed to timber production, or grazing,

TABLE XIX

PER UNIT COSTS AND BREAKEVEN FEES AT DIFFERENT OCCUPANCY
RATES FOR A 100-UNIT USFS CAMPGROUND
IN THE GY/GT AREA

Cost Items	Annual Costs Per Camping Unit			
	Schedule A ^a	Schedule B ^b	Schedule C ^c	Schedule D ^d
Construction ^e	\$145.45	\$318.72	\$318.72	\$318.72
Operation and maintenance	270.00	270.00	270.00	270.00
Land	<u>0</u>	<u>0</u>	<u>180.00</u>	<u>360.00</u>
TOTAL ANNUAL PER UNIT COST	\$415.45	\$588.72	\$768.72	\$948.72
BREAKEVEN FEE ^f				
at 60% occup.	\$ 5.77	\$ 8.18	\$ 10.68	\$ 13.18
at 65% occup.	5.33	7.55	9.86	12.16
at 70% occup.	4.95	7.01	9.15	11.29
at 75% occup.	4.62	6.54	8.54	10.54
at 80% occup.	4.33	6.13	8.01	9.88
at 88% occup.	3.93	5.58	7.28	8.98

^aSchedule A computes cost only for cost recovery, not including interest or cost of land or depreciation for a 100-unit campground on 40 acres.

^bSchedule B costs include 20-year depreciation and allowance for return on investment, but exclude cost of land for a 100-unit campground on 40 acres. Nine percent interest is used instead of the federal 6-7/8 percent discount rate to make these figures comparable to private costs.

^cSchedule C costs include depreciation and return on investment and land costs for \$5,000 an acre for 40 acres at 9 percent.

^dSchedule D costs are the same as C for land cost of \$10,000 an acre.

^eConstruction cost for Schedules B, C, and D include depreciation plus an allowance for return on investment. Sinking fund method was used to compute depreciation and return for a 20-year life of depreciable assets.

^fThe breakeven fee is calculated by dividing the annual cost per unit by the number of sites rented for 120 days at the different occupancy rates. For example, the cost of 376.90 at 60% occupancy is: 120 days x .60 = 72, 415.45/72 = 5.77, the breakeven fee for these circumstances.

or any other possible use. In other words, there is a cost associated with those uses to which the land is not put. For this analysis, land costs of \$5,000 and \$10,000 an acre were used, in Schedules C and D, so that the costs of the public agency campground could be compared to those incurred by private developers. The rationale for using these land figures is the same as was discussed for private campgrounds; that is, it is a conservative estimate of the actual cost of land suitable for campground development in the GY/GT-area.

Table XIX differs from Table XVIII in that there is only one density described: 100 units on 40 acres. Agency personnel indicated that 40 acres would be a minimum land base for construction of an agency-type 100 unit campground. The 40 acre figure in Table XVIII, the private campground example, is treated as a maximum land base, while in Table XIX it should be considered a minimum.

A summation of the construction, operation and maintenance, and land costs for each schedule in Table XIX yields estimates of total annual camping unit costs. These estimates range from a low of \$415.45 when the costs of depreciation, return on investment and land are not included; to a high of \$948.72 when all of the costs applicable to private developers are applied to the public campground development.

Since the public agency campgrounds in the GY/GT area have high occupancy rates throughout the peak season, breakeven points were calculated for 60, 65 and 70 percent, for comparison with the private breakeven fees at those percentages shown in Table XVIII. In addition, breakeven fees were figured to reflect the higher public campground

occupancy rates of 75, 80 and 88 percent.

These rates are calculated in the same way as were those for the private developers: with a seasonal occupancy rate of 60 percent, each camping unit would be rented an average of 72 days. If the public agency operating the campground were to breakeven at this rate, it would have to set fees so that all costs could be covered from 72 days of rental income. Using the per unit cost of \$415.45 from Schedule A, the breakeven fee would be \$5.77 a night if all costs were to be covered from 72 days of rental income. Even at the more realistic average agency occupancy rate of 88 percent, or an average per unit rental of 106 days of the 120-day season, the breakeven fee would be \$3.93 a night.

Since Forest Service campgrounds in the GY/GT area have rental fees of \$2 to \$3 a unit per night, and, in fact, some of the campgrounds in the area are free to the public, it is apparent that there is no point in the breakeven analysis in Table XIX under any conditions at which the Forest Service would break even at the fees charged at the time of this study. Even if specific economies of scale were included in the analysis to reflect the 100 unit size of the hypothetical campground, it is very unlikely that the costs would be lowered enough to economically justify the low fees currently charged.

On the other hand, it is important to note that the Forest Service does not make entirely independent decisions regarding fees charged for campsites. Section 4 of the Land and Water Conservation Fund Act of 1965 (75 Stat 897) as amended stated that:

. . .in no event shall there be a charge for the use of any campground not having the following--tent or trailer spaces, drinking water, access road, refuse containers, toilet facilities, personal collection of the fee by an employee or agent of the Federal agency operating the facility, reasonable visitor protection, and simple devices for containing a campfire (where campfires are permitted).⁸

Although all of the required physical facilities were offered in Forest Service campgrounds in the GY/GT area at the time of the study, it is possible that there were inadequate numbers of personnel in some forests to financially justify personal collection of fees or "reasonable" visitor protection. If this was the case, then there were some Forest Service campgrounds in the area that were necessarily free to the public.

It is also noteworthy that camping fees in the two national parks in the area were comparable to Forest Service fees, and were also considerably lower than private campground fees.⁹ The amount the Park Service may charge for camp and trailer sites, by regulation, may not exceed \$4.¹⁰ Fees charged by the Forest Service are set by the Chief of that agency, or his delegate.¹¹

If Schedules B and D in Table XVIII are compared with Schedules C and D, respectively, in Table XIX, for the occupancy rates of 60, 65 and 70 percent, it is apparent that the private breakeven fees are only slightly higher than the agency breakeven fees. Table XX

⁸U. S. Department of Interior, Bureau of Outdoor Recreation, Federal Recreation Fees, A Report to Congress, 1975, p. E-10.

⁹Op. cit., Interview with Bill Armstrong.

¹⁰Op. cit., Federal Recreation Fees, p. E-16.

¹¹Ibid., p. E-18.

summarizes this comparison. The figures in Table XX are taken from Schedules C and D in Table XIX for the public fees, and from Schedules B and D in Table XVIII for the private fees. Table XX shows that when the costs of the private campground and the public campground were handled in the same manner, i.e., including interest on land, depreciation, and allowance for return on investment, the public agency and private developer campground breakeven fees were very similar. For both the agency campground and the private campground, it is evident that breakeven fees are much higher than the fees that were charged in the GY/GT area at the time of this study.

TABLE XX
COMPARISON OF BREAKEVEN FEES FOR THE
PUBLIC AND PRIVATE CAMPGROUNDS
IN THE GY/GT AREA

Occupancy Rate	Private Fees		Public Fees	
	Schedule B	Schedule D	Schedule C	Schedule D
60 %	\$11.26	\$13.66	\$10.68	\$13.18
65 %	10.39	12.61	9.86	12.16
70 %	9.65	11.71	9.15	11.29

B and C Schedules are based on \$5,000 per acre cost of land.
Both D Schedules are based on \$10,000 per acre cost of land.

Summary

The feasibility schedules developed for both the private and public campgrounds in the GY/GT area show that there was a discrepancy between the fees charged by public and private operators and the fees that would be required to meet the full costs of developing and operating campgrounds. Because the fees charged by the public agencies in the area were not even half of the average private campground fees charged, the discrepancy was even greater for the public sector.

CHAPTER VI

SYNTHESIS

After a period of somewhat intensive public campground development in the GY/GT area during the 1950's and 1960's, both the Forest Service and the Park Service adopted policies of limiting further campground development on agency lands. In addition, both agencies adopted policies of "encouraging" private campground development. It appears that this "encouragement" of private development consisted of not constructing new public campgrounds in the area.

There was considerable growth in the number of private campgrounds during this period, but evidently not at a rate sufficient to accomodate the increasing need for camping units in the area, especially in the Jackson and Cody areas. During the past several years, the rate of private campground development has slowed.

The campground situation in the area at the time of this study was relatively simple. The two federal agencies that manage the great majority of land in the GY/GT area were not developing new campgrounds; the states regarded the provision of new campground accommodations as a federal responsibility; the private sector was not developing new campgrounds at the rate assumed by the public agencies; and the need for campground accommodations in the Jackson and to some extent in the Cody areas was continuing to increase, while there did not appear to be a shortage of accommodations in the West Yellowstone and Gardiner areas.

The data presented in Chapter IV showed that at prevailing land and construction costs, new private campground development was not feasible given the fees charged by private operators in the area at the time of the study. This situation is not likely to change over time, since the costs of construction and land will doubtlessly increase.

The assumption made by the Forest Service and Park Service that the private sector would meet the increasing need for campground accommodations in the GY/GT area has not held for the entire area. It is very important to note again, however, that it was found that some private campgrounds in the West Yellowstone and Gardiner/Livingston areas were not full even during the peak camping season. It was also found that in some instances in the Cody area, and very frequently in the Jackson area, private campgrounds were filled to capacity.

Implications

Research

The first implication of the results of this study is that more needs to be known about the camping market in the GY/GT area. The information presented in this report identified problem areas, offered a number of possible reasons for those problems, and identified the economic and policy framework through which the problems might be solved. It is apparent that there were not sufficient numbers of campground accommodations in parts of the GY/GT area to meet the needs of increasing numbers of camping visitors at the time of this study. Because this shortage often made it necessary for campers to

take whatever sites were available in the area when they arrived, very little is actually known about the preferences of those campers.

This study revealed several reasons why the private campground development presumed by the Forest Service and Park Service in their recreation development policies for the GY/GT area had not taken place. One of the reasons was beyond the scope of this study, but deserves careful consideration in future research. It was discovered that the demand for new private campgrounds did not appear to be homogeneous throughout the area. While the Jackson area private campgrounds were almost always filled to capacity during the peak season, the Cody area was less crowded and the Gardiner and West Yellowstone areas each had private campgrounds that had never been filled. The reasons for this variation in private campground needs were not conclusively determined in this study, but two possible explanations need careful examination.

First, it is possible that land prices in the four different areas accounted for the differences in occupancy rates. Since the Jackson campgrounds were filled to capacity, and since the Jackson area had by far the highest land prices of the four areas, it is possible that land prices have prohibited new private development in the Jackson area for some time. The other three areas, which had land available at half the price of Jackson area land did not experience the 100 percent occupancy rates common in Jackson. It is possible, then, that the Cody, Gardiner and West Yellowstone areas have sufficient numbers of camp units to accommodate camper needs in those areas. Since land

prices in these areas were not as prohibitive as were prices in the Jackson area, it may be that private campground development has kept pace, and in some cases even exceeded, the needs of campers.

A second possible reason for the variation in occupancy rates in the GY/GT area might be that for some reason campers were willing to leave the parks to camp at Jackson and Cody, while they would not go out of the way to camp at the other areas. While no data were available to test this possibility, it appeared that Jackson and Cody were becoming visitor attractions in their own rights. If this was the case, increasing numbers of campers could have been using these two areas as vacation destination spots. If this group of campers does in fact exist, they will take up increasing numbers of camp units, which will in effect reduce the number of units available to accommodate regular park visitors.

If effective solutions to the campground supply problem are to be found, they must be based not only on the results of this study, but also on a careful analysis of the demand side of the camping market in the GY/GT area. Future development, in whatever form it takes, should be in response to both accurate numerical demand projections and the expressed needs and preferences of camping visitors to the area. It appears that the needed demand analysis must be structured so that the GY/GT area is treated not as a single unit, but as at least four separate but related units.

Policy Conflict

There was a paradox within the policies of the Park Service and Forest Service at the time of this study regarding campground development in the GY/GT area. If the Park Service would not allow additional campground capacity within the parks, and if the Forest Service held to its recent policies of providing only for its existing share of campground accommodation needs, the problems that gave impetus to this study could only be expected to increase, especially in the Jackson and Cody areas. Given the information presented in Chapter IV, it should no longer be assumed that the private sector will meet the increasing needs for campground accommodations in the area. The state agencies in the area did not plan to increase the number of campsites available in order to accommodate visitors to the national parks and forests. The implication of the policy paradox was that the two major federal agencies in the GY/GT area must take some action themselves to resolve the campground accommodation problem.

Park Service

The Park Service can be expected to continue its moratorium policy on increased campground capacity within the parks. This policy has implications for both the Park Service and the Forest Service. Since the two national parks are the primary visitor attraction within the GY/GT area, it is fair to assume that the Park Service has some responsibility to accommodate overnight visitors to the area. The campground moratorium policy in effect within the parks implies that

any direct development by the Park Service to accommodate the growing demand for campground facilities in the area would have to take place within the John D. Rockefeller, Jr. Memorial Parkway.

The second implication of the Park Service campground moratorium policy is that, given the infeasibility of new private campground development in the area, especially in the Jackson area, the Forest Service must take some action to relieve the campground supply shortage.

Forest Service

The first implication of the results of this study for the Forest Service is that there must be some increase in the number of campground accommodations available within the national forests to provide for that agency's present share of camper needs, since the need for camping units will apparently continue to increase; especially in the Jackson and Cody areas. It is also possible, given the unlikelihood of extensive new private campground development in the area, that the Forest Service will have to provide for a larger proportion of the needs of camping visitors. In either case, the new Forest Service policies and programs examined in Chapter III provide the framework for initiatives by individual Forest Supervisors to move toward solving the campground problems in the GY/GT area.

There are a number of possible development alternatives allowed for within the RPA Program, the draft CRMA Planning Guide, and the Forest Service Manual. One possibility is for the Forest Service to construct and operate, on the basis of identified needs, new Forest Service campgrounds in the GY/GT area. In light of the feasibility

schedules presented in Chapter IV, however, this alternative does not appear to be financially sound. In addition, new direct Forest Service campground development would appear to conflict with the stated policy of encouraging private sector development.

There are two additional possible development alternatives. The Forest Service may allow concessioner development and operation of private campgrounds on national forest land, or it may develop the campgrounds and allow private concessioners to run them. One implication of the private campground feasibility schedules developed in Chapter IV is that if the prohibitive cost of land can be reduced, it might be possible for private operators to break even at rates comparable to those charged at private campgrounds at the time of the study. Either of the alternative concessioner arrangements should mitigate costs sufficiently to allow for a financially feasible private campground operation at prevailing private fee levels. In addition, either arrangement would effectively encourage private sector development and/or operation, and accommodate visitors to nearby off-forest attractions; both current Forest Service policies.

The new RPA policies, as reflected in the Forest Service Manual, might be instrumental in solving the campground accommodation problem in the GY/GT area. The success of the policies will depend on individual Forest Supervisors who are faced with making decisions between alternative uses of national forest land, and with limited budgets.

Public Agencies

There are a number of implications in the results of this study that apply to both the Park Service and Forest Service, and probably to the state agencies as well. When the often-cited problem of lack of maintenance and operating budget for all of the agencies is combined with the results of the feasibility schedules, the implication is that public agency fees for campsites in the GY/GT area are too low. The camping experience for those visitors able to secure a public agency campsite, then, is being subsidized by those same agencies.

A second implication stems from the policies of the Park Service and Forest Service, and is especially important in the Jackson and Cody areas. If no adjustment is made in the Forest Service policy of accommodating only its current share of camper needs, and if the Park Service does not allow additional campground capacity within the parks or parkway, and if the private sector cannot in fact be expected to fill the need for new accommodations, the implication is that the two agencies do not intend to encourage increased visitor use of the GY/GT area.

Finally, both the Park Service and the Forest Service have adopted policies of encouraging and participating in regional planning efforts. The implication of these policies is somewhat complex. Since the two agencies manage the vast majority of land in the GY/GT area their decisions affect not only each other, but also the area's private sector. Regarding campground development, it does not seem reasonable to expect either of the agencies or the private sector to accommodate

all of the increasing needs for campgrounds in the years ahead. The regional planning policies of the two federal agencies seem to imply that it is possible for the responsibility of providing for increasing campground needs to be shared by the federal agencies, the state agencies, and the private sector.

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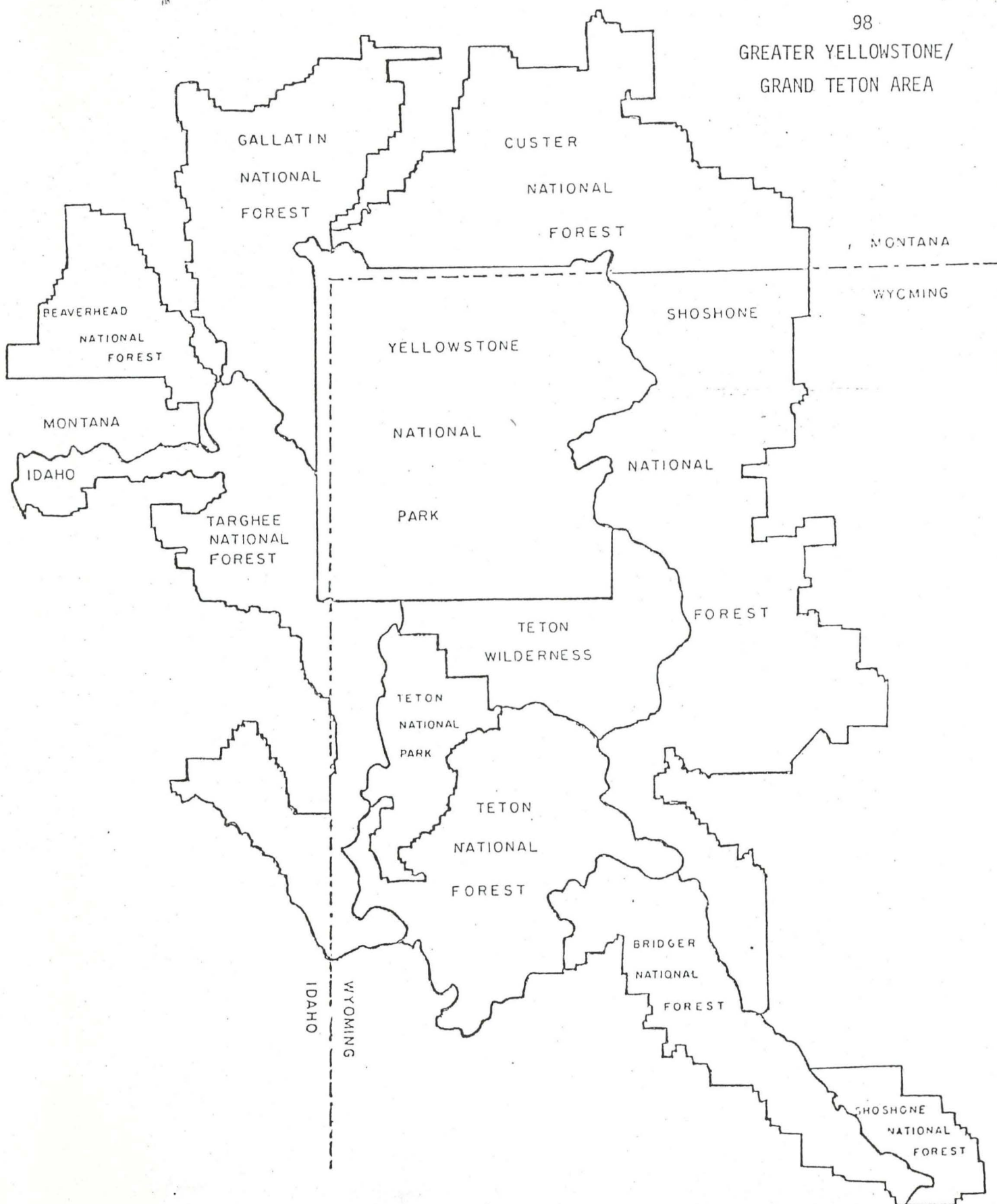
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APPENDIX A

MAP OF THE GREATER YELLOWSTONE/GRAND TETON AREA

GREATER YELLOWSTONE/
GRAND TETON AREA

APPENDIX B

PUBLIC AGENCY INSTRUMENTS

- A. Public Agency Cover Letter
- B. Public Agency Questionnaire

THE UNIVERSITY OF WYOMING



WATER RESOURCES RESEARCH INSTITUTE

P. O. BOX 3067, UNIVERSITY STATION

LARAMIE, WYOMING 82071

PAUL RECHARD
DIRECTORTELEPHONE: 766-2143
AREA CODE: 307

June 27, 1977

Dear

You are aware that the National Park Service and the United States Forest Service are jointly conducting a regional transportation study for the Greater Yellowstone/Grand Teton National Parks area. One of the many issues that has surfaced in the course of this study is the question of future campground development. The Park Service has stated that the number of camping units in both parks will be maintained at 1971 levels. The Forest Service has adopted the policy under the Resources Planning Act that their recreation programs would concentrate on dispersed recreation and that private enterprise would be encouraged to provide developed recreation facilities.

The essence of the policies of both agencies with respect to campground development, even though they may have resulted for different reasons, is that private enterprise is being counted on to provide needed future campground facilities.

Visitors have come to the Greater Yellowstone/Grand Teton area in record numbers the past two seasons. There have been a number of occasions when every public and private overnight facility in the area was filled by early afternoon, and late arriving visitors without reservations were referred to campgrounds eighty to ninety miles from the area. The facility shortage included camping areas as well as commercial lodging.

We obviously do not know whether the present shortage of facilities is a temporary situation that will eventually attract the private capital needed to provide the required facilities or whether it is an indication that private investors do not consider visitor accommodations, especially campgrounds, to be good investments. What we do know is that private enterprise has not provided the facilities that the policies of the two agencies have presumed.

As a means of assessing the feasibility of private enterprise campground development, the Rocky Mountain Forest and Range Experiment Station has funded through its Eisenhower Consortium research program this study of campground development alternatives. As the title suggests, the study

June 27, 1977

Page 2

objective is to examine the feasibility of commercial campground development in the Greater Yellowstone/Grand Teton area. We will contact appropriate planning and design units within both agencies to obtain pertinent agency cost data and a representative sample of private campground operators in the area.

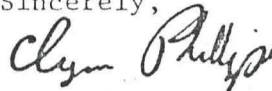
In addition to the cost and revenue data that will be compiled in the feasibility assessment, we are contacting the Superintendents of the two Parks, the Supervisors of the Forests in the study area and the Region Office or Headquarters of the two agencies in an attempt to (1) develop a comprehensive background on the policies that have been stated and (2) to obtain from agency management personnel an indication of how they currently perceive the campground development problem.

The enclosed questionnaire was designed to give you direction as to the problems and concerns we would like you to consider. Please do not feel you are limited to the questions contained on the questionnaire if we have overlooked some problems or issues. The questionnaire is of a probing nature and will probably generate a "goodly amount" of frustration. Nevertheless, we do appeal for a forgiving kind of patience that will see you through completion of the various questions. You can be assured that all answers and comments will be treated confidentially (even if it becomes necessary to narratively vent a frustration).

We anticipate that at the Park and Forest level there will be an inclination to forward the questionnaire up to the Region, as it is customary for the Region to explain agency policy. We are asking you to withstand such temptation and complete the questionnaire as best you can at the Park or Forest level. The perspective of the operating manager is a response of high priority insofar as we are concerned.

We know you have an appreciation for the many development issues and policy implications that have and will surface in the course of the transportation study. We, too, have an interest in these concerns. The enclosed questionnaire and the other phases of the study we have outlined represent a sincere attempt on our part to resolve one of these issues. Your assistance in this endeavor will be very much appreciated.

Sincerely,



Clynn Phillips
University of Wyoming



Beverly Driver
U. S. Forest Service

Enclosure
/jaa

A SURVEY TO DETERMINE AGENCY POSITIONS AND PROBLEMS REGARDING
PUBLIC AND PRIVATE CAMPGROUND DEVELOPMENT IN THE
GREATER YELLOWSTONE/GRAND TETON AREA

1. For the years shown below, please record the approximate number of campgrounds and camping units your agency provided in the Greater Yellowstone/Grand Teton (GY/GT) Area shown on the cover map.

YEAR	CAMPGROUNDS	TOTAL UNITS
1955		
1960		
1965		
1970		
1975		

2. Can you offer any suggestions about the reasons why your agency developed the number of campgrounds and units they did at different times during the past twenty years?

3. Agencies managing lands in the GY/GT Area have experienced and are experiencing different types of problems with regard to public and private campgrounds in that area. Several of these problems are listed below. First, please look at each problem and check it (in the box provided) if it has been a past problem or is a current problem to your agency in the GY/GT Area. Then briefly explain how each of those checked has been a problem to your agency.

PAST PROBLEMS		CURRENT PROBLEMS	
P ₁	<input type="checkbox"/> Adequacy of past agency policies regarding campgrounds:	<input type="checkbox"/>	Adequacy of current agency policies regarding campgrounds:
P ₂	<input type="checkbox"/> Past budgeting for campgrounds:	<input type="checkbox"/>	Current budgeting for campgrounds:
P ₃	<input type="checkbox"/> Conflicts between your agency and other agencies regarding campground development in the past:	<input type="checkbox"/>	Conflicts between your agency and other agencies regarding campground development in the present:
P ₄	<input type="checkbox"/> Past public or private rules and administrative regulations regarding campgrounds:	<input type="checkbox"/>	Current public or private rules and administrative regulations regarding campgrounds:
P ₅	<input type="checkbox"/> Past development of campgrounds by the private sector:	<input type="checkbox"/>	Current development of campgrounds by the private sector:
P ₆	<input type="checkbox"/> Other past problems (specify):	<input type="checkbox"/>	Other current problems (specify):

4.

Instructions

There are five policies listed below. The column headings to the right indicate past and current agency practices regarding those policies. For each of the policies listed, please check that one column which best represents your agency's position on that policy within the GY/GT Area in the past. Then check the column that best represents your agency's current position on that policy. When finished you should have two checks for each policy: one for the past and one for current.

POLICYWithin the GY/GT Area

- A. Expanding public campground development on agency administered land: →
- B. Expanding public campground development on public land administered by other agencies: →
- C. Developing private campgrounds on agency administered land: →
- D. Developing private campgrounds on public land administered by other agencies: →
- E. Developing private campgrounds on private lands in the vicinity of agency administered land: →

PAST AGENCY PRACTICE

(check one for each policy below)

Encouraged and actively committed money or other resources to the policy

Encouraged and committed only a little money or other resources to the policy

Encouraged but committed no money or other resources to the policy

Discouraged the policy

CURRENT AGENCY PRACTICE

(check one for each policy below)

Encourages and actively commits money or other resources to the policy

Encourages and commits only a little money or other resources to the policy

Encourages but commits no money or other resources to the policy

Discourages the policy

5. Please check any of the following public/private campground policies that you feel might be feasible in the GY/GT Area:

- ☐ a. Expand publicly developed and operated campgrounds on public lands.
- ☐ b. Provide public financial assistance to private entities to develop and operate private campgrounds on public lands.
- ☐ c. Publicly developed campgrounds on public lands, but privately operated.
- ☐ d. Privately developed and operated campgrounds on public lands.
- ☐ e. Expand privately developed and operated campgrounds on private lands.
- ☐ f. Provide public financial assistance to private entities to develop and operate private campgrounds on private lands.

6. Identify any significant changes in your agency's campground policies in the GY/GT Area over the past twenty years, and explain briefly why these changes occurred:

7. Is there any formal documentation of your agency's past or current policies regarding campground development in the GY/GT Area? (i.e. guidebooks, manuals, program statements, policy directives or handbooks) YES ☐ NO ☐

If YES, please name those major program efforts where documentation of policies can be identified. (i.e. Mission 66, Operation Outdoors, RPA, etc.)

8. In your judgement, what will be the trends in future total campground accommodation needs in the GY/GT Area in the next five to ten years, regardless of public/private provision.

- ☐ Increase greatly
- ☐ Increase moderately
- ☐ Increase somewhat
- ☐ Increase a little
- ☐ No change
- ☐ Decrease

9. What public and private campground policies would you like to have established within your agency for the GY/GT Area?

Within the Public Sector: _____

Within the Private Sector: _____

10. What public and private campground policies do you think will be established within your agency for the GY/GT Area in the next five to ten years?

Within the Public Sector: _____

Within the Private Sector: _____

11. Describe any problems your agency might have in implementing the policies you have indicated in 9 and 10.

9: _____

10: _____

12. Has your agency formulated a current estimate of need for campground accommodations in the GY/GT Area? YES ☐ NO ☐

If YES, please indicate your estimate: _____

THANK YOU FOR YOUR HELP

APPENDIX C

PRIVATE CAMPGROUND OPERATOR INSTRUMENTS

- A. Initial Contact Letter
- B. Private Operator Interview Instrument

THE UNIVERSITY OF WYOMING



WATER RESOURCES RESEARCH INSTITUTE

P. O. BOX 3087, UNIVERSITY STATION

LARAMIE, WYOMING 82071

PAUL RECHARD
DIRECTOR

July 15, 1977

TELEPHONE: 766-2143
AREA CODE: 307

Dear Campground Operator,

The United States Forest Service and the University of Wyoming's Water Resources Research Institute are conducting a private campground financial feasibility study in the Yellowstone/Grand Teton area. The purpose of the study is to examine ways in which the Forest Service and National Park Service policies of encouraging private campground development in the area can be made more effective.

As an essential part of the analysis, we need to be able to develop per-unit costs of construction, operation, and maintenance, as well as occupancy rates for private campgrounds in the area. In this regard, we would greatly appreciate your help.

I realize that this is your busy time of year, but if you could find a little time to assist us with the study, I am sure you will find the study results helpful and informative. Any information you give us will, of course, be held in the strictest confidence.

I will be in the area in the next week to ten days, and will contact you personally then. Thank you in advance for your help.

Sincerely,

A handwritten signature in cursive script, reading "Jacquelin Papka".

Jacquelin Papka
Graduate Researcher

PRIVATE CAMPGROUND OPERATOR
INTERVIEW INSTRUMENT

INTERVIEW NUMBER: _____

DATE: _____

TIME: _____

INTERVIEWER: _____

NAME OF BUSINESS: _____

LOCATION & ADDRESS: _____

PHONE #: _____

TYPE OF BUSINESS: _____

NAME OF INTERVIEWEE: _____

POSITION: _____

AGE OF BUSINESS: _____

STARTED BUSINESS ORIGINALLY? _____ YES _____ NO

IF NO, HOW LONG HAS OPERATOR OWNED AND OPERATED BUSINESS? _____

HOW LONG HAS CAMPGROUND PART OF BUSINESS BEEN IN OPERATION? _____

OPERATING SEASON: _____ TO _____

NUMBER OF DEVELOPED ACRES: _____ ACRES

NUMBER OF ACRES IN CAMPSITES: _____ ACRES

EXPANSION ACRES OWNED: _____ ACRES

WAS THE LAND ORIGINALLY PURCHASED FOR THE PURPOSE OF HAVING A CAMP-

GROUND? _____ YES _____ NO

IF NO, FOR WHAT PURPOSE WAS IT BOUGHT? _____

HOW MANY CAMPING UNITS TOTAL? _____ UNITS

TYPES OF UNITS: _____ PULL THROUGH
 _____ TRUCK/CAMPER
 _____ TENT
 _____ OTHER (SPECIFY _____)

WHICH OF THE FOLLOWING SERVICES ARE AVAILABLE:

<u>SERVICE</u>		<u>CHARGES</u>
ELECTRICITY	# OF UNITS _____	\$ _____
WATER	# OF UNITS _____	\$ _____
SEWER	# OF UNITS _____	\$ _____
DUMP	____ YES ____ NO	\$ _____
TOILETS	____ YES ____ NO NUMBER _____	\$ _____
SHOWERS	____ YES ____ NO NUMBER _____	\$ _____
LAUNDRY	____ YES ____ NO SIZE _____	\$ _____
STORE	____ YES ____ NO SIZE _____	\$ _____
RECREATION HALL	____ YES ____ NO SIZE _____	\$ _____
POOL	____ YES ____ NO SIZE _____	\$ _____
PLAYGROUND	____ YES ____ NO EQUIP. _____	\$ _____
GAS	____ YES ____ NO	
PHONE	____ YES ____ NO	\$ _____
ICE	____ YES ____ NO	\$ _____
RIDING	____ YES ____ NO HORSES. _____	\$ _____
OTHER (SPECIFY)	_____	

CHARGES PER NIGHT: BASE \$ _____ ADDITIONAL: \$ _____

WHAT PERCENTAGES OF THE FOLLOWING TYPES OF CAMPERS USE YOUR CAMPGROUND:

TENT _____ %

POP-UPS _____ %

TRUCK CAMPERS _____ %

TRAILERS _____ %

MOTOR HOMES _____ %

OTHER _____ % (SPECIFY _____)

WHAT IS THE CURRENT TREND OF YOUR CAMPING BUSINESS:

- ☐ GROWING RAPIDLY
☐ GROWING SLOWLY
☐ STEADY
☐ DECLINING SLOWLY
☐ DECLINING RAPIDLY

HAVE YOU EXPANDED RECENTLY? ☐ YES ☐ NO

IF NO, DO YOU PLAN TO EXPAND? ☐ YES ☐ NO

IF YOU EXPANDED, WHAT TYPE OF FACILITIES WOULD YOU BUILD?

DO YOU FEEL YOUR RETURN BUSINESS IS GOOD? ☐ YES ☐ NO ☐ %

DO MOST OF YOUR CUSTOMERS MAKE RESERVATIONS AHEAD? ☐ YES ☐ NO
☐ %

DO YOU FEEL THAT YOU HAVE VERY STRONG COMPETITION? ☐ YES ☐ NO

COMMENTS REGARDING THE CAMPGROUND BUSINESS IN THE AREA: _____

OPERATING COSTS

WHAT ARE YOUR OPERATING COSTS FOR THE CAMPGROUND ONLY FOR ONE YEAR?

(if you have a balance sheet, that might be useful.)

HIRED LABOR	\$ _____
FAMILY LABOR	\$ _____
MANAGER	\$ _____
TOTAL PAYROLL	\$ _____
TAXES	\$ _____
INSURANCE	\$ _____
ADVERTISING	\$ _____
REPAIRS & MAINTENANCE	\$ _____
UTILITIES	\$ _____
PHONE AND POSTAGE	\$ _____
OTHER _____	\$ _____
_____	\$ _____

COSTS II

(CAPITAL COSTS FOR NEW OR RECENTLY EXPANDED CAMPGROUNDS CONTACTED.)

ORIGINAL LAND PURCHASE: \$ _____	ADDITIONAL LAND PURCHASE \$ _____
ROAD DEVELOPMENT AND CONSTRUCTION	\$ _____
CLEARING AND CONSTRUCTING CAMPSITES	\$ _____
UTILITIES INSTALLATION COSTS	
(WATER, ELECTRIC, GAS)	\$ _____
CONSTRUCTION OF RESTROOMS, TOILETS	\$ _____
CONSTRUCTION OF SHOWERS	\$ _____
CONSTRUCTION OF LAUNDRY	\$ _____
CONSTRUCTION OF STORE	\$ _____
CONSTRUCTION OF RECREATION HALL	\$ _____
CONSTRUCTION OF SWIMMING POOL	\$ _____
OTHER SHEDS AND BUILDINGS	\$ _____
PLAYGROUND	\$ _____
CONSTRUCTION OF OFFICE	\$ _____
CONSTRUCTION OF OTHER FACILITIES	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

EQUIPMENT COSTS

TABLE	\$ _____	STORE EQUIPMENT	\$ _____
GARBAGE CAN	\$ _____	PHONE (PUBLIC)	\$ _____
FIRE PLACE	\$ _____	OTHER COSTS	
SIGN	\$ _____	_____	\$ _____
PLAYGROUND EQUIPMENT	\$ _____	_____	\$ _____
LIGHTING FIXTURES	\$ _____	_____	\$ _____
VEHICLES	\$ _____	_____	\$ _____
TOOLS \$ MISC. EQUIP.	\$ _____	_____	\$ _____
ICE MACHINE	\$ _____	_____	\$ _____
OFFICE EQUIPMENT	\$ _____		
LAUNDRY EQUIPMENT	\$ _____		